

SCHOOL LIFE

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OFFICE OF EDUCATION

In this issue

THE COURTS AND MARRIED STUDENTS

HOWARD A. MATTHEWS

STUDENT BORROWERS UNDER NDEA

ROBERT C. HALL AND STANTON C. CRAIGIE

NOVEMBER-DECEMBER 1961



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St. Paul

U.S. DEPARTMENT OF HEALTH, EDUCATION, AND WELFARE • ABRAHAM RIBICOFF, *Secretary*

OFFICE OF EDUCATION . . . STERLING M. McMURRIN, *Commissioner*

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Brief.

EDUCATION AND GOVERNMENT

Reports

Employment committee

President Kennedy has established a President's Committee on Youth Employment to help solve the disturbing problem of nearly 1 million young persons who are neither in school nor employed. The committee has 23 members drawn from labor, industry, education, social service, and Federal and State Governments. Arthur J. Goldberg, Secretary of Labor, is chairman; James B. Conant, former president of Harvard University, is vice chairman.

The committee will conduct an all-out attack: it will marshal Government and private resources, develop public understanding, spark State and local group action, and act as a clearinghouse for research and information. One of the largest problems is to prevent young people from leaving school before they have finished their studies.

Other committee members are: Luther H. Hodges, Secretary of Commerce; Abraham Ribicoff, Secretary of Health, Education, and Welfare; Robert F. Kennedy, Attorney General of the United States; Robert C. Weaver, House and Home Finance Administrator; Joseph A. Beirne, president, Communications Workers of America; Samuel M. Brownell, superintendent of schools, Detroit; Eli E. Cohen, executive secretary, National Committee on Employment of Youth; Mark Cresap, Jr., president, Westinghouse Corporation; Buford

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Secretary Goldberg has announced that he is establishing a youth employment division in the Bureau of Employment Security.

Language and the typewriter

Deaf children usually acquire language 2 or 3 years later than normal boys and girls since they must first learn to lipread and to speak. But if a theory Gallaudet College is now testing proves sound, the typewriter may help cut down the time differences. Through a 2-year project called "New Methods of Language Development in Deaf Children," the college will study the use of the type-

writer as a means of teaching language to the deaf child. The first year will be given to finding the most effective of several variations of the proposed method; the second, to a controlled comparison of the experimental method with conventional methods of language introduction. Deaf children from age 3½ to 8 will take part.

Gallaudet, the world's only college for the deaf, receives partial support from the Department of Health, Education, and Welfare.

Exchange act expanded

The Mutual Educational and Cultural Exchange Act of 1961 (Public Law 87-256) recodifies and amends the Fulbright and Smith-Mundt Acts, the principal authorization for Government-sponsored educational exchange programs.

The new law broadens the old educational exchange program. By authorizing more flexibility in the use of funds, it makes long-range planning possible; it is also generous in the authority it gives for the acquisition of foreign currencies from any source, including the sales of surplus agricultural commodities.

The following new provisions are of special interest to education:

Language and area studies.—Authorizes the financing of visits to foreign countries by teachers or prospective teachers in U.S. schools, colleges, and universities to improve

their skills in the languages of the countries and to gain a knowledge of the culture of their people. It also authorizes the financing of visits of foreign teachers to the United States to take part in foreign language and area training.

Research on educational exchange problems.—Authorizes Government financing of independent research in problems of educational and cultural exchange.

Dependents' expenses.—Extends authority to pay travel and other expenses of the exchange student or teacher and to include travel and living expenses of the dependent members of the immediate family.

Service to foreign students.—Authorizes the Federal Government to provide orientation courses, including language training, for foreign students whether or not they are receiving financial support from the Federal Government; authorizes the President (or his delegated official) to arrange with colleges and universities to provide counseling services for foreign students.

Advisory boards.—Authorizes the enlarging of the Board of Foreign Scholarships from 10 to 12 members and assigns to it additional responsibilities for programs of American studies abroad and for modern language training for teachers. Authorizes the enlarging of the U.S. Advisory Committee on Educational Exchange from 5 to 9 members and the renaming of it as the U.S. Advisory Commission on Educational and Cultural Affairs (it will now report to the President, not the Secretary of State).

Appropriations.—Appropriated \$27 million for fiscal year 1962 and authorized the purchase of \$7.4 million in foreign currency to be used in the special currency programs authorized by the Agricultural Trade Development and Assistance Act of 1954 (funds were not appropriated, however).

Presidential library

President Kennedy has chosen Harvard University, his alma mater, as the site for the Kennedy Library and Museum. By choosing so soon in his administration, the President makes possible the preservation of many documents that might otherwise be lost. The library and museum will be the fifth Presidential library and museum maintained under a law passed by Congress in 1955. Two libraries are already in operation and receive thousands of visitors each year—the Roosevelt at Hyde Park, N.Y., and the Truman at Independence, Mo. Two are under construction—the Hoover at West Branch, Iowa, and the Eisenhower at Abilene, Kans.

Harvard has named three staff members to work with President Kennedy and the National Archives in choosing a location and in planning the building, financing, and administration of the Kennedy Library and Museum.

Traveling art exhibits

Fifty young American artists—boys and girls from kindergarten through grade 8—are represented in one of the newest groups of paintings assembled by the Smithsonian Institution Travel Exhibition Service. All 50 paintings, chosen from entries in the fourth annual exhibition held by *Arts and Activities* magazine, are on the theme "My Friends." The young painters regard many people and things as their friends, and parents, playmates, traffic cops, flowers, cats, and musical instruments appear in their works.

"My Friends" is one of 20 exhibits the Service has prepared for loan. Ten of these are on children's art, including the works of children in Africa, India, Ceylon, Chile, and Tokyo. Several exhibits are on

America—"The American City in the 19th Century," "This Is the American Earth," and "American Textiles." Several are scientific—"The Image of Physics" and "Charles Darwin: The Evolution of an Evolutionist." One combines art and science—"Physics and Painting."

All exhibits will be loaned for 3 weeks. The exhibitor pays a rental fee ranging from \$35 to \$175 (the fee for "My Friends," for instance, is \$65) and the cost of shipping to the next exhibitor. The fee covers handling costs and insurance.

For more information about these exhibits, write to the Traveling Exhibition Service, Smithsonian Institution, Washington 25, D.C.

Women as underwriters

There is a career for women in life underwriting, particularly for women who like people, who are outgoing, ambitious, and willing to work hard.

This is the opinion of the Women's Bureau of the Department of Labor after a long look at the job from a woman's standpoint. It has found that opportunities for women in insurance selling are expanding; that they are not limited to the young, for the characteristics of maturity—stability, a sense of responsibility, and good judgment—are valuable assets in an underwriter.

What the Women's Bureau has found out about insurance underwriting, the qualifications, the opportunities, the training required, and other pertinent matters, it has put into a bulletin, "Life Insurance Selling: Careers for Women as Life Underwriters." It has also prepared a condensation in the form of a leaflet with the same title.

Both publications are for sale at the Superintendent of Documents, Government Printing Office, Washington 25, D.C. The bulletin's price is 20 cents; the leaflet's, 5 cents.

The courts and married students

INTEREST IS HIGH these days in the subject of adolescent marriages, judging from the large and increasing number of articles appearing in all types of periodicals. Since many young marriages involve students in the public schools, the subject of teenage marriages is particularly interesting to school people—teachers, administrators, school board members. Undoubtedly, married students bring special problems to the schools. Some student marriages have even brought school boards and students to court on opposite sides of the judge's bench. More student marriages—and every indication is there will be more—are likely to lead to more litigation.

I have written this article to suggest what may be a trend in the judicial thinking on the subject of married students in the public schools and to furnish a reasonably comprehensive reference on the matter for those interested in the legal aspects of the problem of married students in the school. The major part of this article is a chronological review of the action taken by appellate courts on cases involving married students in the public schools. To make the article more useful, I have included a list of opinions of State attorneys general on the subject and a list of representative articles chosen from current periodicals discussing different aspects of teenage student marriages.

In the nearly 100 years that have passed since the first court test of a statute relating to the admission to a public school of an applicant "under 21 and unmarried,"¹ courts of record have heard less than a dozen cases involving married students in the public schools. Two were heard in 1929; the others since World War II.



Mr. Matthews, head of the school law unit of the Office of Education, has been a classroom teacher and a principal of both elementary and secondary schools. He came to the Office in January 1960 from the Alaska Department of Education, where he had served as a secondary school supervisor, assistant commissioner, and commissioner of education. His work included assisting the Alaska Legislative Council in a comparative study of State school codes for the purpose of developing a recodification of Alaskan school laws.

An analysis of the decisions in each case suggests to me a growing disposition of the courts to look with some favor on rules and regulations of boards of education limiting or restricting the activities or attendance of married students and otherwise discouraging early marriages.

The first known ruling by a State attorney general on the matter of married students in the public schools was issued in Michigan in 1911. Between 1911 and 1946 only eight State attorneys general wrote on the subject, chiefly on the applicability of compulsory attendance statutes to students who marry while still of compulsory attendance age. In the 15 years since World War II, however, State attorneys general have issued at least 26 opinions on the power of school boards to control not only the attendance of married students but their conduct and extracurricular activities as well.

Right to attend

I believe that the most frequently cited decision of an appellate court of record on the right of married students to attend the public schools is the one handed down by the Supreme Court of Mississippi in June 1929 in the McLeod case.² At issue was the right of a school board to bar a student from school solely on the basis of marriage. The board had passed the resolution under authority granted by the State to school boards to "suspend or dismiss pupils, when the best interests of the school make it necessary."³ The case concerned a 15-year-old girl who was denied admittance to the Moss Point, Miss., school for no other reason than that she was married.

In weighing the merits of the case, the court stressed the separate powers of boards of education and of the courts in these words:

The court will not consider whether such rules and regulations are wise or expedient, but merely whether they are a reasonable exercise of the authority conferred upon the trustees by law. It is peculiarly within the province of the trustees to determine what things are detrimental to the successful management, good order, and discipline of the schools in their charge, and the rules required to produce those conditions.

¹ *Draper, Trustee, & C. v. Cambridge*, Supreme Court of Indiana, May Term, 1863.

² *McLeod et al., Trustees Moss Point Public Schools v. State ex rel. Miles* (Mississippi), 122 So. 737 (1929).

³ Par. 15, Sec. 126, c. 283, Laws of 1924: Mississippi (Sec. 8767, Hemingway's Code 1927).

The presumption is always in favor of the reasonableness and propriety of any such rule. The reasonableness, however, is a question of law for the courts.⁴

In striking down the board's regulation, the court said:

It is argued that marriage emancipates a child from all parental control of its conduct as well as such control by the school authorities; and that the marriage relation brings about views of life which should not be known to unmarried children; that a married child in the public schools will make known to its associates in schools such views, which will therefore be detrimental to the welfare of the school. We fail to appreciate the force of the argument. Marriage is a domestic relation highly favored by the law. When the relation is entered into with correct motives, the effect on the husband and wife is refining and elevating rather than demoralizing. Pupils associating in school with a child occupying such a relation, it seems, would be benefitted instead of harmed.⁵ [Italics mine.]

Exclusion for reasons of conduct

In 1929 the Supreme Court of Kansas, in the case of *Nutt v. Board of Education of the City of Goodland*,⁶ had to determine the reasonableness of the exclusion of a married girl from school for reasons of questionable conduct. Though the courts said that the constitutional and statutory right of every child to attend public school is always subject to reasonable regulation, and that a "child who is of a licentious or immoral character may be refused admission,"⁷ a majority of its justices declared the board's ruling invalid. The majority opinion stated:

We are of the opinion the evidence was insufficient to warrant the board in excluding plaintiff's daughter from the schools of Goodland. It is the policy of the State to encourage the student to equip himself with a good education. The fact that the plaintiff's daughter desired to attend school was of itself an indication of character warranting favorable consideration. Other than the fact that she had a child conceived out of wedlock, no sufficient reason is advanced for preventing her from attending school.⁸

Three justices, however, dissented. One of them, Justice Hopkins, quoting from a previous Kansas case involving the power of school boards, argued that the court had exceeded its authority. He said, "The control of the city schools . . . is devolved by the legislature upon the board of education. The discretion committed to that body is to be exercised . . . 'untrammelled by judicial interference.' . . . Its judgment, and not that of the

courts, must determine the proper solution of the practical questions of administration that continually arise. Its decisions must be final except when its action is capricious or arbitrary."⁹ He and the other dissenting justices found no "bad faith on the part of the defendants," and they contended that the judgment of the court "should not be substituted for that of the board of education."

Exemption from compulsory attendance

Not until 1946 did another court of record hear a case on the attendance of a married student. In that year the Supreme Court of Louisiana, in the case of *State v. Priest*, set aside the ruling of a juvenile court, which had found a married girl, age 15, to be truant for not attending school because State law required every child to attend until his 16th birthday. The lower court had disregarded her plea that marriage gave her an exemption.

In ruling in the girl's favor the court averred that "the marriage relationship, regardless of the age of the persons involved, creates conditions and imposes obligations upon the parties that are obviously inconsistent with compulsory school attendance or with either the husband or wife remaining under the legal control of parents and other persons."¹⁰

In substance, the court's ruling means that a juvenile becomes an "emancipated minor" when he marries and is no longer a child in the sense that he is under the care and control of a parent, guardian, or other person responsible for his school attendance.

The disposition to consider married students emancipated from compulsory attendance was reaffirmed by the Supreme Court of Louisiana in 1959 in the Goodwin case.¹¹ In this instance, the court held that the marriage of a 14-year-old girl, although illegally performed, was valid and that she was not a "child" under parental or other control and, therefore, not subject to compulsory attendance laws. A minor, it said in effect, who acquires the status of wife has the right and the obligation to live with her husband and to accompany him wherever he resides. In reversing a trial court's ruling, the court, citing the Priest case as precedent, said this:

While we view with sympathy the trial judge's deep convictions of the tragedy inherent in the marriage of girls of tender years and his skepticism of any ultimate good resulting therefrom, we recognize the basic fact that under our system of government the matter of fixing the public policy of this State with respect to the age at which people may or

⁴ 24 R.C.L. pp. 575, 576, par. 24.

⁵ *McLeod v. State*, supra, at 738.

⁶ *Nutt v. Board of Education of City of Goodland, Sherman County, et al.* (Kansas), 278 P. 1065 (1929).

⁷ Rev. St. 1923, 72-1029, 72-2614, 72-3209 (Kansas). See also *Kenny v. Gurley*, 208 Ala. 623, 95 So. 34, 26 A.L.R. 813; 24 R.C.L. pp. 644-648.

⁸ *Nutt v. Board of Education*, supra, at 1066.

⁹ *Williams v. Board of Education of City of Parsons*, 81 Kan. 593, 106 P. 36. (See also dissenting opinion in *Ryan v. Board of Education*, 124 Kan. 89, 257 P. 945).

¹⁰ *State v. Priest* (Louisiana), 27 So. 2d 173, 174 (1946).

¹¹ In re *State in Interest of Goodwin*, 214 La. 1062, 39 So. 2d 731 (1949).

may not marry as well as fixing the status of marriages solemnized in violation thereof *lies exclusively within the province of the legislative branch.*¹² [Italics mine.]

The court emphasized, as did the dissenting justices in the Nutt case, that the court's responsibility is not to fix public policy but to interpret whether the acts of public officials conform to the laws enunciating public policy.

Temporary exclusion

In 1957 the Supreme Court of Tennessee heard the first test in a court of record on the reasonableness of a school board's temporary exclusion of married students from school under certain conditions (*State v. Marion County School Board*).¹³ It found reasonable the board's resolution excluding from school for the rest of the term students who marry during a term and excluding from the next term students who marry during the vacation.

The case involved a young woman of 18 who married in February of her last year in high school. The school board in accordance with its regulation (admittedly aimed at discouraging student marriages) forbade her attendance during the remaining 3 months of the school year. Her father-in-law sought a writ of mandamus to have her reenrolled so she could graduate with her class. He asserted that it was unreasonable for the board to exclude her so near graduation.

In deciding in favor of the school board, the court noted the fact that the board had acted on the advice of the high school principals of the county. It commented on this fact in these words:

If the representation made to the County Board of Education by every high school principal in Marion County as to their respective observations and experiences on this subject is at all accurate, then married students, and by virtue of the psychological effect thereof, *for a few months immediately following marriage, have a detrimental influence upon fellow students, hence a detrimental effect upon the progress and efficiency of the school.* [Italics mine.]

We are accustomed to accept the testimony of experts in the various fields of human activity as to what is reasonably necessary for the welfare of the particular activity as to which this expert therein is testifying. No reason is suggested as to why this practice should not be followed when the witness is an expert in the field of operating public high schools.¹⁴

In concluding that the regulation adopted by the school board under its statutory responsibility to "suspend pupils when the progress or efficiency of the school makes it necessary," was a reasonable one, the court stated that its duty, regardless of the personal views of its justices, is to uphold a school board's regulation unless the regulation appears

arbitrary and unreasonable and that "it is not a question of whether a judge or a court considers a given regulation adopted by a board as expedient." Its position is in line with that taken by other courts—that boards of education, not the courts, are charged with the difficult task of operating the public schools.

Note, however, that the Tennessee court apparently rejected the reasoning of the Mississippi court in the McLeod case and accepted the opinion of the high school principals that at least for a limited time following marriage the married student's presence in the school has an adverse effect on the morale and efficiency of the school. In distinguishing the Marion case from the McLeod case the court declared that, "Whatever else may be said of that case [McLeod] it is distinguishable from the instant case [Marion] by the fact that the resolution there adjudged unreasonable, hence void, expelled such marrying students *permanently* from the public schools."¹⁵ [Italics mine.]

Marriage not necessarily emancipating

One year later, in 1958, the Ohio Supreme Court heard a case involving the foster parents of an 11-year-old married girl who were found guilty of acting in a way "tending to cause delinquency in such a child" when they helped her to marry.¹⁶ Though the circumstances of the marriage are not pertinent to this article, the results of the case are, for they concern the "emancipated minor" principle.

In reviewing the case, the court noted that the records were silent on whether the girl's marital duties had caused or could cause her to be a truant. It said, however, that it would be remiss if it shut its eyes to the fact that "the duties of homemaker are strenuous, and there is a certain propensity among young married couples to propagate, neither of which activities is conducive to regular attendance at school." It went on to lecture the parents for participating in an activity which tended to make their daughter "incapable of continuing her school attendance with a probable result that she would, *before reaching 18*, be found a delinquent child because of truancy." [Italics mine.]

It might be argued from this statement in the court's decision that, in Ohio at least, marriage of a minor might not necessarily make him "a minor emancipated" from compulsory school-attendance laws.

On the other hand, another statement of the court leads me to compare its thinking with that of the courts in the McLeod and Marion cases and to conclude that the

¹² In re State (Goodwin), *supra*, at 733.

¹³ *State v. Marion County Board of Education* (Tennessee), 302 S.W. 2d 57 (1957).

¹⁴ *State v. Marion*, *supra*, at 59.

¹⁵ *State v. Marion County*, *supra*, at 59.

¹⁶ *State of Ohio v. Gans* (Ohio), 151 N.E. 2d 709 (1958).

court was in agreement with the belief that married students can have a bad influence on the school. On this question it said:

Even if we were to assume for the purpose of argument that it is not probable that Kay's schooling will be frustrated by her marriage, and were to assume that she will continue to attend school, it is at once apparent that she will, by virtue of her marriage, have certain knowledge and attitudes which will be far more mature than those of her classmates and about which most of her classmates will, if at all, only have begun to think seriously. *It is such knowledge and attitude that, even in more mature years, tends to keep married groups and single groups separate.*

It is unfortunate but true that, assuming that Kay should remain in school, *the more successful her marriage would be the more it could tend to cause her to act so as to adversely affect the morals of her classmates.*¹⁷ [Italics mine.]

Exclusion from extraclass activities

Following the reasoning of the Tennessee Supreme Court, the Dallas (Tex.) Court of Civil Appeals in 1959 sustained a resolution of the Garland Independent School District of Dallas restricting married students or previously married students to classroom work and barring them from athletic exhibitions and positions of honor, other than academic.¹⁸

The case was brought to court by a married student barred from playing football (he was hoping to win a college athletic scholarship). He attacked the board's ruling as discriminatory, unreasonable, and unconstitutional in that, among other things, it was retroactive (the resolution had been passed after his marriage).

The board's testimony included two reports (one submitted by the Parent-Teachers Association and the other by a psychologist) on the ill effects on the school of married students participating in extracurricular athletics. Other testimony showed an "alarming increase" in the number of married students in Garland school, that the dropout rate was high among married students, and that married students who remained in school often suffered as much as a 10 point drop in scholastic attainment.

In rejecting the argument of the student, the court said, "Undoubtedly it [the resolution] had a direct relationship to the objectives sought to be accomplished by school authorities—that of discouraging the marriage of teen-age students." It found no validity in the student's argument that the resolution was retroactive, and in support cited the case of *Wilson v. Independent School District*¹⁹ in which the court ruled that a school board regulation for-

bidding fraternities and sororities applied also to members at the time the resolution was adopted.

The court did not consider the opportunity to win an athletic scholarship a vested right. It held that football cannot logically be considered a "required" subject because only a select few can substitute it for a physical education course required of all students. Thus football, it said, is extracurricular and not a part of the regular curriculum.

The Dallas court's decision upheld the principle enunciated in the Marion case that school boards have the power to make such reasonable regulations as they deem proper, and the right to the exclusive management and government of the schools. It closed its written opinion by quoting from the Marion case: "The court's duty, regardless of its personal views, is to uphold the board's regulation unless it is generally viewed as being arbitrary and unreasonable. Any other policy would result in confusion detrimental to the progress and efficiency of our public school system."²⁰

The second appellate court case involving the right of school boards to restrict the extraclass activities of married students is that of *Cochrane v. Board of Education of Messick Consolidated School District*, heard by the Supreme Court of Michigan in 1960.²¹ The court split 4-to-4 on an appeal from a decision of a circuit court which had found that a school district does not violate the statutes guaranteeing to all students an equal opportunity to use public educational facilities when it excludes married students from participating in extracurricular activities. Although the equally divided vote has the practical effect of affirming the decision of the circuit court, the court's action cannot be considered as establishing legal precedent.

Exclusion of pregnant students

A mandamus action was brought early this year (1961) in an Ohio court of common pleas for the reinstatement of a 16-year old married student excluded from school under a rule of the Trenton (Ohio) Board of Education that required pregnant students to withdraw.²²

In sustaining the regulation of the board, the court emphasized the wide discretionary power of school boards in the operation of schools and noted Section 3321.94 of the Ohio statute which permits exemption from compulsory attendance because of "bodily or mental conditions." The court observed, however, that public policy in Ohio requires that basic education "may not be frustrated or thwarted by boards of education by adopting the

¹⁷ *State v. Gans*, *supra*, at 175.

¹⁸ *Kissick v. Garland Independent School District* (Texas), 330 S.W. 2d 708 (1958).

¹⁹ *Wilson v. Abilene Independent School District*, Tex. Civ. App., 190 S.W. 2d 406.

²⁰ *Kissick v. Garland*, *supra*, at 712.

²¹ *Cochrane v. Board of Education of Messick Consolidated School District* (Michigan), 103 N.W. 2d 569 (1960).

²² *State ex rel Idle v. Chamberlain*, 175 N.E. 2d 539 (1961).

rule that marriage in and of itself will cause a child to be prohibited from attending school." In arriving at its decision, the court considered both the physical well-being of the student and the morale of her classmates. It also considered the fact that the school would permit her to carry on correspondence work with full credit during her exclusion and to return to school after the birth of her child.

FROM THE eight cases I have reviewed, it appears that there is developing a degree of uniformity in the judicial mind on several issues raised by the presence of married students in the schools. I believe, for instance, that we can expect the courts to consistently rule that students who marry against the wishes of the school board cannot be excluded from school solely on the basis of marriage. It also appears that we can expect the courts to hold generally that compulsory attendance statutes do not apply to married students. The most recent court decisions suggest that the courts will continue to be reluctant to substitute their judgment for that of school boards and that they will find reasonable, and within the authority of local school boards to make, regulations excluding married students for limited periods of time following marriage or during pregnancy, or restricting married students from certain activities. Such disposition of the courts will support school boards in their efforts to discourage early marriages of public school pupils.

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- . Teen-Age Marriages. *NEA Journal* 50: 22-28, Sept. 1961.
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State	Date and number
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Colorado.....	OAG No. 57-3069, June 11, 1957.
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Interest rates on school bonds: Recent trends

THE PEOPLE of this country are paying nearly \$2 billion a year on public school debt service—about 10 percent of all their expenditures for public elementary and secondary schools. If every school administrative unit devoted only 10 percent of its revenue to debt service, payments would create no problem. But the debt is not evenly distributed; it is highly concentrated in urban areas. And for these areas the debt is a serious problem. Some have to use 25 percent of their total revenue for interest and bond retirement; this means that about half of the revenue they raise from local taxes goes into debt service. For these areas, and even for many with smaller debts, interest payments have become a significant factor in financing public education.

There are several reasons for the increase in debt service. The first obviously is the annual increase in bond sales for public school purposes. Sales reached \$1 billion for the first time in 1950, and for the last 5 years they have averaged more than \$2 billion a year. Before 1950 the outstanding bonded debt was less than \$5 billion with annual interest payments usually under \$100 million; now it is more than \$15 billion with

interest payments of more than \$500 million.

But a reason more important to the local district than dollar volume of sales is the rate of interest, for rate and maturity schedule determine the amount of annual and total interest it must pay to retire bonds. In turn, the rate of interest is governed by many factors, including the interest rate level at the time of sale, quality rating of the bonds, maturity schedule, call features, date offered, locality, and the reputation and skill of the issuing agency in placing its bonds on the market. Furthermore, there is an interaction among these factors. For example, the quality rating of the bonds depends to a considerable extent on the maturity schedule: bonds maturing in 10 years with a Moody rating of A might have been rated as Baa if the term had been 20 or 25 years; conversely, bonds maturing in 20 or 25 years with a Baa rating might have been rated as A if the term had been 10 or 15 years. (In the five classes of Moody-rated bonds, Aaa is the highest rating, and Ba the lowest.)

OF ALL these factors in interest rates on school bonds, the level of current interest rate has the greatest influence. We can measure its influence by comparing rates on school bonds with rates on U.S. Treasury long-term bonds and on tax-exempt high-grade municipal bonds, the most reliable standards of the current level.

Between 1942 and 1960, the rate on Government bonds moved sharply upward in 1955 and reached a peak in 1959, and high-grade municipals also rose—they are the general obligation bonds of State and local governments, including school districts (see chart

1). Since Government bonds became taxable under the Revenue Act of 1941, the rate on high-grade municipals has run a half of one percentage point below that on Government bonds. The rates on high-grade municipals shown here are on bonds sold in the secondary market, where bonds are offered for resale and rates are usually higher than on original sales.

Rates on school bonds followed this general upward swing: between 1954 and 1959 (rates are not available for earlier years) the average net interest cost rose from 2.28 percent to 3.76 percent. Although school bonds are tax-exempt, in 1957 the interest rate was nearly one-fourth of one percentage point higher than the rate on taxable Government bonds. In comparing these rates, we should bear in mind that the rate on school bonds was for all sales of all qualities and included bonds of school-building holding companies, which are usually long term and without quality ratings.

These figures take on new meaning when we translate rates into payments on a thousand-dollar bond: A school district that paid \$22.80 a year in interest for a bond it sold in 1954 had to pay \$37.60 on one it sold in 1959—a 65-percent increase. In a district already hard pressed to raise revenue to provide for teachers and facilities for their ever-increasing enrollment, the increase may mean the difference between good schools and poor schools. Many districts are hard pressed, and year by year they are feeling the pinch of increased costs more severely. During the last 5 years administrative school units have sold more than \$10 billion worth of bonds, averaging more than 3.5 per-



Mr. Deering, OE specialist in financing school facilities, Division of State and Local School Systems, makes a continuing study

of school bond issues and interest rates. His column, *School Bonds*, is a regular feature of *School Life*.

cent in interest costs and requiring more than \$350 million a year in interest charges. At the 1954 rate the charge would have been \$228 million. This means that school units are paying about \$125 million a year just for the increase in rates.

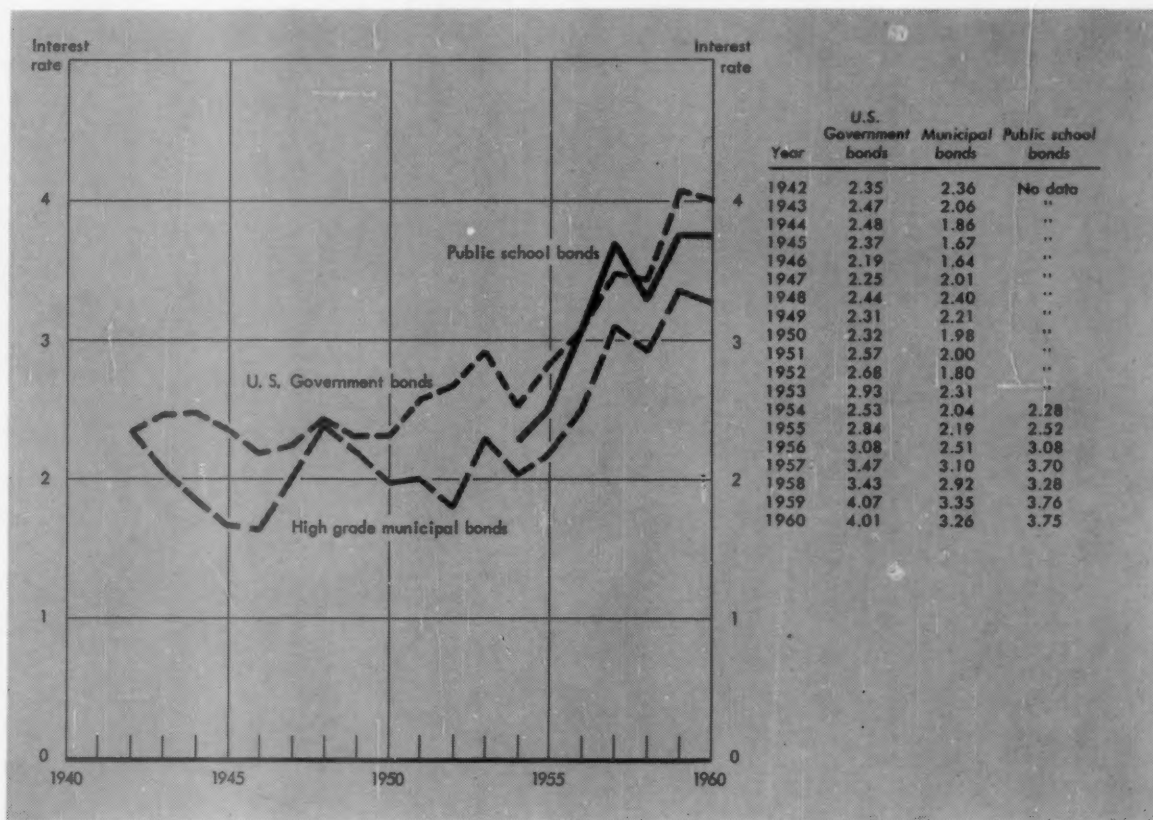
During the 5-year general rise in the interest-rate level some school bond issues sold at a net interest cost of less than 2 percent, others at more than 5 percent. There isn't anything that local school administrative units can do about the general interest-rate

level, but there may be something they can do about accepting obligations to pay more than the average rate. If, for example, they could improve the rating of school bonds and shorten the terms, the average rate would be considerably lower.

THE CREDIT STANDING of the issuing agency is, with the exception of the prevailing interest-rate level, the single greatest factor in interest rates. Here again we can measure influence, this time by com-

paring the rates of interest on school bonds of different quality ratings (see chart 2). Within the last 2 years, except for the January-March quarter of 1961, bonds rated Ba sold, on the average, at more than one percentage point higher than triple A bonds. In the October-December 1959 quarter Ba bonds sold at 1.71 percentage points higher than triple A bonds. The average district that sold Ba bonds in that quarter had to pay \$17.10 more a year in interest on each \$1,000 bond than the district that sold

Chart 1.—Average interest rates on public school bonds sold on the primary market and on U.S. Government long-term bonds and high-grade municipal bonds, 1942-60



Source: Rates on U.S. Government bonds are from the Federal Reserve Bulletin; from 1942 to 1948 they are based on bonds maturing after 15 years, and from 1948 to 1960 on bonds maturing after 12 years. Rates on municipal bonds, also from the Federal Reserve Bulletin, are based on Standard and Poor from 1942 through 1951, and on Moody Aaa bonds from 1952 through 1960; these are bonds sold in the secondary market, where rates are usually higher than in the primary market. Rates on school bonds are from the Office of Education, which since 1954 has separately reported the average net interest rates on all school bonds sold on the primary market by all issuing agencies (States, counties, cities, towns, townships, school building holding companies, and school districts); the Office has collected these figures by school years but here they are converted to calendar years.

triple A bonds. The Ba rating means that the district was already having financial difficulties, and to make matters worse, it had to pay 56 percent more in debt service as a result of its low financial standing.

During the past 2 years, school bonds have received these ratings prior to original sale:

Moody rating	1959-60	1960-61
	Amount (in millions)	
Aaa	\$59	\$42
Aa	411	490
A	613	751
Baa	351	394
Ba	33	45
	Percent of total	
Aaa	4.0	2.4
Aa	28.0	28.5
A	41.8	43.6
Baa	23.9	22.9
Ba	2.3	2.6

Only a small percentage of the bonds sold in these 2 years received the highest or lowest rating, but a substantial volume of Baa bonds, next to the lowest rating, was sold at a very high interest cost. Because of their low financial standing, districts that sold Baa bonds will pay \$5.80 more in interest on every \$1,000 bond than those that sold double A bonds.

In both years interest on bonds with an A rating was very near the average of all rated bonds, with Aaa bonds and Aa bonds above average and Baa and Ba below the average. The interest rate reached a peak in the July-September quarter of the 1959-60 school year and in each succeeding quarter dropped slightly, falling to 3.42 percent in the April-June quarter of 1960-61 (see chart 2).

A low credit rating may be due to circumstances beyond the control of the local school district; for example, a low-rent housing development that doubles its enrollment could very well lower its financial stability. Most districts, however, might raise a low rating through these methods: By consolidating or reorganizing districts, describing more logical attendance

areas, organizing more economical classroom units, increasing the assessed valuation of property, issuing shorter term bonds, maintaining a balanced budget, meeting financial obligations on time, and documenting evidence that the district is in a sound financial condition.

THE TERM of the bond issue is another factor in interest rates. In 1959-60 the average net interest cost for bond issues maturing in 25 years and over was nearly half of one percentage point higher than that on issues maturing under 15 years, and in 1960-61 it was over two-thirds of one percentage point higher (chart 3).

In the July-September quarter, 1960-61, the rate on issues of 25 years

and over was 0.9 percentage point higher than that on issues of less than 15 years. The higher rate means \$9 more interest a year on each \$1,000 bond.

Why do school districts issue long-term bonds if the interest rate is higher? There must be a good reason because more than 40 percent of the dollar volume of school bonds sold in the last 2 years was for maturities of 25 years and over, while less than 6 percent was for maturities of less than 15 years. Although the interest cost on long-term bonds is greater in the long run, the annual debt service is less. Boards of education must give first consideration to balancing the budget for the current year. If they live in States that limit the aggregate

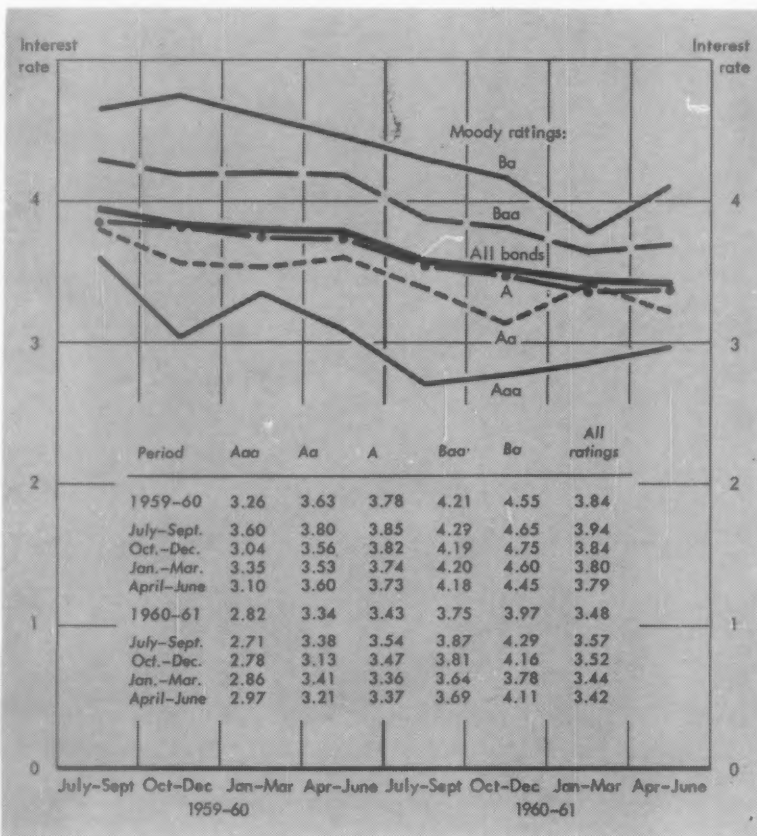


Chart 2.—Average net interest rates on public school bonds, by Moody ratings, by quarters, 1959-60 and 1960-61

tax rate for public school purposes, every increase they make in the rate for debt service automatically decreases the rate for current expenses from which teachers' salaries are paid.

In the past 2 years rated bond issues have been for these terms:

	1959-60	1960-61
<i>Amount (in millions)</i>		
Under 15 years.....	\$79	\$99
15-24 years.....	721	950
25 years and over.....	608	670
<i>Percent of total</i>		
Under 15 years.....	5.6	5.7
15-24 years.....	51.2	55.3
25 years and over.....	43.2	39.0

Nearly \$1.3 billion of these bond issues will not be completely liquidated until about 1985 or after. In many

school districts these issues have been preceded by other long-term issues and must be followed by still others. This pyramiding of long-term bonds is exhausting the bonding power of many school districts and is the primary reason for low quality ratings.

ALL SCHOOL population projections forecast another wave of increased school enrollments in the early 1970's. If at that time bonding power is not available for school construction, the classroom emergency is likely to become much worse than it is now. The prospect of a heavy wave of necessary construction in the 1970's emphasizes the risk in issuing bonds now that will not be paid until after the next emergency.

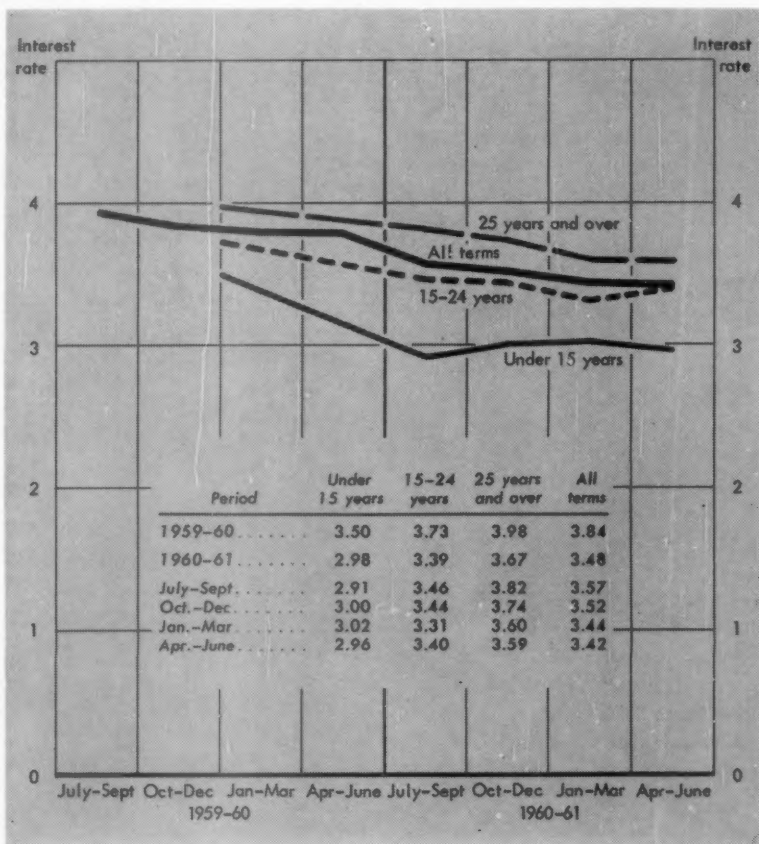


Chart 3.—Average net interest rates on public school bonds sold on the primary market, by term, in 1959-60 and, by quarters, in 1960-61

Education of Cuban Refugees

TEN THOUSAND refugee children from Cuba have swelled the classrooms of Dade County, Fla. To help the school system meet the extra expense of properly educating these children, the Federal Government has made \$1.6 million available for the first semester of the present school year. These funds will be used to help reimburse the county for the cost of constructing and operating classrooms, employing Cuban aides for the counseling and guidance services, and providing teaching materials. They will also be used to support evening courses for young people and adults, particularly courses for teaching them the English language.

In addition, the Government has made \$27,250 available to the University of Miami for training and placing Cuban refugees who are studying dentistry or law. Another \$400,000 will provide continuing support of college-university loans for Cuban refugee students and will help to defray the cost of higher education for about 1,500 Cuban students enrolled at about 160 institutions of higher learning in the United States.

These funds will make it possible for the Dade County Public Schools to continue their intensive English institute program, and for the University of Miami to continue its Cuban Affairs Research Project.

All these Federal funds are made available through the Mutual Security Act of 1954, sec. 451(a), as amended.

Plain words from Mr. Ribicoff on dropouts

On October 19, Secretary Ribicoff of the Department of Health, Education, and Welfare, spoke to the Audited Bureau of Circulations in its 47th annual meeting in Chicago. The Secretary called on his hosts—executives of leading publishers, advertising agencies, and national advertisers—to join him in a battle for clarity, for plain unvarnished words, for language which informs and which dispels confusion and misunderstanding. Present the people with facts, he says, and the people will make the right decisions. Mr. Ribicoff illustrated his point with plain facts. We quote:

WE WHO SEEK, under the law, to promote the general welfare have sometimes unconsciously accepted the language of our critics. And this language has come to dominate both sides of the argument.

The critics themselves do not have ice water in their veins. Many of them are generous to their neighbors in time of need, some are leaders in community work. They are mostly serious-minded men and women, voicing their honest doubts in good faith. Perhaps there are some of them among you, or among your friends. Nevertheless, they have tended to confuse themselves and others by language which is imprecise and misleading.

To take another example, in discussing Federal aid to education, they have cast the whole issue as one of "States rights" against "Federal control" or domination.

But these words have nothing to do with the case. The simple truth is that the Federal Government has long recognized a responsibility to do its part to insure that education in America is of the highest quality of which we are capable. For over a century, Federal aid has helped to serve the national interest. The total of all Fed-

eral funds devoted to educational activities in the fiscal year 1960 was \$2.7 billion.

"Education," said a distinguished United States Senator in 1946, "is primarily a State function—but in the field of education, the Federal Government, as in the fields of health, relief and medical care, has a secondary interest or obligation to see that there is a basic floor under those essential services for all adults and children in the United States." These words were spoken by the late Senator Robert A. Taft of Ohio, in support of his own bill to provide Federal grants to the States for education.

The point is the Federal Government already is helping education on a large scale. When we needed to accommodate more students in our colleges and universities after World War II, we passed the College Housing Act. When the rise of Sputnik shocked our whole society, we passed the National Defense Education Act.

Now a crisis of great import is developing in education. Hundreds of thousands of school children, lacking decent classrooms, are learning their lessons in hallways, in basements, in ramshackle buildings that present acute fire and health hazards, in double and even triple shifts. There are not enough teachers to teach them. There are not enough colleges and universities or vocational schools for them to aim toward. The quality of their daily lessons may be low.

Dr. Conant has put the spotlight this week on a dramatic aspect of this crisis which he describes in . . . *Slums and Suburbs*, as "social dynamite."

I agree with this description. Thousands of youngsters in our big cities, out of school, out of work, untrained for jobs by unrealistic school programs, discriminated against by employers and by unions—these

youngsters can scarcely join in the building of a strong America. They lack the opportunity. Moreover we have new evidence of the seriousness of this problem. Our high school dropout rate has reached fantastic proportions: Two and one half million of the 10,800,000 students enrolled in grades 9 through 12 of the Nation's public and nonpublic schools this fall will drop out before graduation.

This is a national problem of frightening implication representing a terrible waste of our youth, and it is found—not just in the big cities—but in every State. The dropout rate ranges from 20 to 40 percent in the 50 States. I submit that the Federal Government has a responsibility here. This administration has proposed that the Government assume this responsibility.

We have sought and will continue to seek to strengthen the Nation's schools in facilities, curriculum, counseling, and the quality and salaries of our teachers so that we can hold our young people in school.

We have sought and will continue to seek a Youth Opportunities Act which will give boys and girls work opportunities in our large cities so that they will have a chance for constructive work experiences.

We have sought creative new approaches outside normal school programs. We have asked that 10 percent of the grants to States proposed in President Kennedy's bill for Federal aid to education be set aside for special projects, experimentation, and demonstration. These special programs should be designed to attack head on just the sort of problem highlighted in Dr. Conant's book.

At the direction of the President, I have appointed a panel of outstanding men and women concerned with manpower needs and vocational education to advise me on the present condition of vocational education . . .

THE FIGURES in this table bear directly on Secretary Ribicoff's statement on the preceding page. They were compiled by the Office of Education and are offered with this qualification: interstate migrations during the 4 years covered by the table, together with shifts between public and non-public schools, prevent the first 2 columns from being completely comparable.

Our purpose in establishing this panel is to upgrade and update the character and quality of vocational education, to guarantee that as we move into an age of advanced technology and increased industrialization and automation our manpower needs will be fully satisfied and our young people fully prepared.

But all in all, I see no real solution to this problem until the Federal Government assumes its proper proportionate role in the financing of American education. For in this democracy of ours education is usually the key that unlocks the door to opportunity.

Will this mean "Federal control" or will it threaten "States rights"?

It will not. Rather it will mean control of a situation which Dr. Conant, after thorough study, has called explosive and possibly disastrous.

I can assure you that the acceptance of Federal funds doesn't mean Federal domination. In my 6 years as Governor of Connecticut and in my months as the Cabinet officer having primary responsibility for Federal education policies and activities, I have never heard from a school principal, a superintendent, a mayor, or a governor, the slightest indication that he sensed any Federal control of education. On the contrary, the Federal interest as I have seen it in operation *strengthens* the capacity of State and local governments to provide for their education needs.

These are the facts. But they have been confused by the words.

The number of ninth graders in 1956-57 compared with the number of high school graduates 4 years later, public schools, by State

State	Ninth graders, 1956-57	High school graduates, 1959-60	Percent not graduating
Total U.S. (50 States).....	2,370,146	1,623,461	31.5
Alabama.....	52,200	¹ 31,700	39.3
Alaska.....	1,898	1,095	42.3
Arizona.....	16,442	10,406	26.7
Arkansas.....	29,885	18,910	26.7
California.....	² 187,203	148,871	20.5
Colorado.....	¹ 22,194	15,848	28.6
Connecticut.....	¹ 30,371	22,200	26.9
Delaware.....	5,018	3,490	30.5
Florida.....	56,907	37,296	34.5
Georgia.....	58,712	34,127	41.9
Hawaii.....	² 7,650	6,287	17.8
Idaho.....	11,306	8,179	27.7
Illinois.....	119,236	82,922	30.5
Indiana.....	67,902	45,914	32.4
Iowa.....	38,952	² 29,909	23.2
Kansas.....	31,156	¹ 21,500	31.0
Kentucky.....	42,639	24,911	41.6
Louisiana.....	44,248	26,238	40.7
Maine.....	12,495	8,304	33.5
Maryland.....	38,532	23,854	28.1
Massachusetts.....	² 65,054	47,599	26.8
Michigan.....	² 100,402	74,424	25.9
Minnesota.....	49,356	38,996	21.0
Mississippi.....	32,647	19,473	40.4
Missouri.....	55,178	36,797	33.3
Montana.....	¹ 9,650	6,974	27.7
Nebraska.....	18,514	14,347	22.5
Nevada.....	3,888	2,299	40.9
New Hampshire.....	7,226	4,947	31.5
New Jersey.....	70,885	52,442	26.0
New Mexico.....	13,893	8,211	40.9
New York.....	206,990	134,471	35.0
North Carolina.....	¹ 75,363	45,271	39.9
North Dakota.....	9,324	⁴ 7,328	21.4
Ohio.....	122,832	89,024	27.5
Oklahoma.....	39,305	26,478	32.6
Oregon.....	26,704	20,105	24.7
Pennsylvania.....	148,692	107,175	27.9
Rhode Island.....	8,974	6,250	30.4
South Carolina.....	37,712	22,291	40.9
South Dakota.....	10,020	7,582	24.3
Tennessee.....	55,425	32,593	41.2
Texas.....	125,404	76,500	39.0
Utah.....	14,799	11,270	23.8
Vermont.....	4,779	3,175	33.6
Virginia.....	52,093	30,262	41.9
Washington.....	² 41,144	29,695	27.8
West Virginia.....	35,042	21,758	37.9
Wisconsin ⁵	48,994	40,004	18.3
Wyoming.....	4,904	3,759	23.3

¹ Estimated by Office of Education.

² Enrollment not cumulative, but as of a specific date.

³ Includes persons granted high school equivalency certificates.

⁴ Estimated by the State.

⁵ Excludes data for vocational schools.

Student borrowers under NDEA: regional contrasts

EVEN BEFORE a single college student had applied for a loan under the National Defense Education Act, predictions were being made about the borrowers. Some said, for example, that women would not borrow, that married men would not borrow, that fathers would not borrow; some said that most of the borrowers would be people who wanted to attend colleges outside their own State or region. The conjectures were many and various, and in the summer of 1960 the Office of Education undertook a survey in an effort to replace conjecture with facts. It requested every student borrowing money under NDEA between July 1 and September 30 to fill in a questionnaire at the time he signed the note; and from these questionnaires—86,359 in all, representing 1,050 institutions of higher learning—it took a systematic random sample of 30,246, which it has subsequently analyzed and studied from several angles.

Since its first report on this survey, which appeared in Higher Education in July 1961 and reviewed results for the Nation as a whole, the Office has analyzed the data on a regional basis and found some interesting differences among regions. The authors of the following report point out these differences and venture to give some possible explanations, which they ask the reader to consider with caution inasmuch as the survey was not designed to uncover reasons for the differences.

WHEN WE PRESENT a nationwide view of student borrowers under the National Defense Education Act, we cover over the interesting contrasts that appear when they are studied by smaller areas. And when we present them State by State, we call attention to some extreme contrasts that rise from purely local circumstances, sometimes to heights far out of proportion to their significance. Between the State and the Nation, however, there is another area, which, as we examine it, gives us more perspective than either of the others—the region. From the regional point of view the extremes of State contrasts flatten out, but not so much that all differences disappear.

As we analyze our data by region* we note some interesting differences which seem to make a worthwhile

addition to our storehouse of information about the student loan program under NDEA. The reader, however, should remember two facts throughout. First, he should remember that we have identified these differences solely on the basis of information supplied by our sample and when we say, for example, that Western borrowers are older than the borrowers in any other region or that more of them hold a part-time job, we are not making a definitive statement but only reporting what some thousands of borrowers have told about themselves. Second, the reader should remember that the survey was not designed to test the significance of the differences between regions. The percentages of difference are small, but because the sample was large we judge the differences substantial enough to deserve attention.

Personal and social characteristics

MOBILITY. No region produced evidence that availability of loans had strongly influenced students to cross State lines or regional boundaries in their choice of college; all were close to the national average, which showed only 1 out of 10 borrowers leaving the region containing his home State. Western borrowers, however, stayed closest to home: 8 out of 10 studied within their own States, in contrast to 7 out of 10 among easterners.

AGE. Western borrowers were oldest. In each age group from 21 years and up, the West had the largest



DR. HALL



MR. CRAIGIE

Dr. Hall, head of the Research and Analysis Unit of the National Defense Student Loan Program, has been with the Office of Education since the early days of the program. Mr. Craigie, research assistant to Dr. Hall, was formerly with the Business Administration Section of the Division of Higher Education.

*The regions are the four usually defined by Office of Education studies: East, Central, South, and West. This study includes, in addition to the 50 States, Puerto Rico, as part of the South.

percentage of borrowers; in each younger group it had the smallest.

What accounts for the "older-ageness" of the western borrower? Perhaps his attitude toward borrowing was more conservative. Perhaps the lending policy of many western institutions favored the older student. Or perhaps it just happened that most western students who applied for a loan were in the upper age brackets. Our study did not provide the means of identifying reasons; we can only suggest some possibilities.

SEX AND MARITAL STATUS. The West had the largest proportion of married borrowers—about 3 in 10 compared to 2 in 10 for the Nation and slightly more than 1 in 10 for the East. Though the East and the West were at opposite ends in this matter, each maintained its distinction in every academic class.

The fact that married students made up such a large proportion of the western borrowers may have been the result of their having had an advantage over single students in proving their need for a loan. Or it may have been merely that the West had the largest percentage of married students applying for loans.

Each region conformed closely to the national ratio between the sexes—2 women to every 3 men. Obviously the prediction many people made at the beginning of the program, that women by and large would not borrow for their education because the debt would have the opposite effect of a dowry, was false.

CHILDREN. The West had the largest proportion of borrowers with dependent children: 1 out of 5, compared to 1 out of 12 in the East. What is more, it had the largest proportion of borrowers in each number-of-children category—the largest proportion with 1 child, the largest proportion with 2 children, etc.

This distinction may be attributable merely to more parents having applied for and received loans in the West than in any other region; or it may be that in western institutions generally a student's having dependent children weighed more heavily in the determination of whether he needed a loan.

INCOME OF PARENTS. No matter what the region, the preponderance of borrowers came from low-income homes. In the West the salaries of borrowers' parents adhered closely to the pattern of the Nation as a whole, as follows:

<i>Income of parents</i>	<i>Proportion of borrowers</i>
\$4,000 or less.....	2 in 5
\$6,000 or less.....	7 in 10
\$8,000 or less.....	17 in 20
More than \$12,000.....	1 in 100

Parental incomes were lowest in the South and highest in the East: in the South 3 out of 5 borrowers estimated

them at \$4,000 or less; in the East, only 3 out of 10.

The fact that on the average 1 out of 100 borrowers came from homes where the income exceeded \$12,000 should not be taken to mean that some students were able to borrow without showing need. Because of one circumstance or another, even these students had met the "needs" requirement set by the lending institutions.

YOUNG BROTHERS AND SISTERS. The presence of dependent brothers and sisters in the borrower's family was, of course, as important a part of his need as his parents' small income and the high costs of college. Borrowers were therefore asked to tell how many brothers and sisters they had who were under 22 years of age.

On that basis, western borrowers came from the smallest families: less than 1 in 3 had no brothers and sisters (the national average was 1 in 4). Southern borrowers, on the other hand, came from the largest families: 7 in 100 had 6 or more brothers and sisters (the national average for this size of family was only 4 borrowers in 100). The South and Central regions had the largest proportions of borrowers with 5 brothers and sisters and also the largest proportions with 4.

The fact that so many westerners reported small families may have owed as much to the 22-year cutoff line in counting brothers and sisters as to the sizes of their families. After all, the western borrowers *were* the oldest and were perhaps the likeliest to have brothers and sisters too old to be counted as dependent.

Studies and expectations

ACADEMIC YEAR. At the time he first borrowed under NDEA, the western student was farther along in college than the first-time borrower in any other region. The West had the largest proportion of first-time borrowers in each of the three highest categories—junior, senior, and graduate—and the smallest proportion among both freshmen and sophomores.

The apparent disinclination of westerners to borrow until they were upperclassmen or graduate students suggests at least two possible explanations: (1) That western students were more conservative than other students about incurring debt for education and (2) that participating institutions in the West were generally reluctant to lend to freshmen and sophomores. There is also the possibility, of course, that the West had the largest proportion of freshmen and sophomores with sufficient funds to defray their expenses during the first 2 years.

ACADEMIC MAJOR. When it came to the fields in which borrowers were either majoring or intending to major, each region conformed closely to the national pattern. Fourteen in 20 borrowers had received special considera-

tion because of superior background or preparation in education, science, mathematics, engineering, or modern foreign languages. Eight of these were in education, 3 in science, and 2 in engineering; 1 was in mathematics. Three in 100 were in languages.

In every region, too, the majority of the borrowers in science, mathematics, and engineering were men; the majority in education and languages were women.

LEVEL OF DEGREE EXPECTED. Western borrowers, more than any of the others, expected to pursue their present course of study beyond the bachelor's level—4 in 20 compared to 3 in 20 in the Central Region and the South and 2 in 20 in the East. The West also had the largest proportion—3 in 20—working on the master's degree. The Central Region had the largest proportion planning on the doctor's degree—2 in 20.

One explanation for regional differences in this matter may be that western and Central institutions were emphasizing a little more than any of the others the granting of loans to graduate students.

PLANS TO TEACH. The West and the Central Region had the highest ratios of borrowers planning to teach—14 in 20 and 13 in 20, respectively, compared to 11 in 20 in the East and 12 in 20 in the South. In each region the borrowers planning to teach were divided almost evenly between men and women.

Several circumstances may have combined to give the West and the Central Region the highest ratios of prospective teachers. For example, the borrowers in those regions may have been more aware than the others that one of the principal goals of the loan program is to prepare teachers and that therefore a prospective teacher receives special consideration for a loan. Or they may have been more strongly influenced by the fact that part of their debt would be canceled if they became public school teachers. The high ratio in the West might have resulted partly from the relatively high salaries paid to teachers in a few States of that region.

The proportion of borrowers planning to teach at each level did not vary widely among the regions, and the secondary school, as choice of teaching level, took precedence everywhere: the ratio of prospective teachers who said they would teach at that level was over 11 in 20 in the West and the East and even higher in the Central Region (12 in 20) and the South (13 in 20). The West had the largest proportion planning on the elementary school (1 in 4 prospective teachers), and the East the largest percentage planning on college (1 in 5).

The regional differences in this matter may have resulted partly from differences in the policies of the lending institutions. Western institutions, for instance, may have put the most emphasis on lending to prospective ele-

mentary teachers; the eastern institutions, the most emphasis on college teachers. Or the differences may have meant only that the demand for loans at each of the teaching levels differed from region to region.

SAVINGS. In all regions borrowers' savings were close to the national average: 4 in 5 had less than \$251; only 1 in 100 had more than \$1,000. The South had the largest percentage reporting less than \$251.

DEBT FOR EDUCATION. Borrowers' debts for education also differed little: about 4 in 5 in every region reported no more than \$501; 3 in 5, no more than \$251.

For college students, however, debts, like savings, are highly fluid, and by now a great many of these same students have seen their debts grow and their savings dwindle. The Office of Education plans to report, for each fiscal year, the average total loans received by borrowers under NDEA.

ATTITUDES TOWARD DEBT. From region to region, borrowers did not vary much in their attitudes toward incurring debt for their education. About 1 in 4 put his debt ceiling at \$1,000; 1 in 2 at \$2,000. Women specified lower debt ceilings than men. Borrowers intending to become physicians and dentists had the highest ceilings.

DEPENDENCE ON NDEA LOANS. The dependence of borrowers on NDEA loans was nearly uniform throughout the country. The South had the largest proportion—16 in 20—who said they depended entirely on NDEA loans to finance their education; the Central Region had the smallest—15 in 20. The other two regions were between these "extremes."

SIZE OF LOAN. The average loan was largest in the West—\$536. It was \$508 in the East, \$506 in the Central Region, and \$433 in the South.

These differences may reflect differences in the administrative practices of the institutions in the various regions. For instance, in one region the institutions may consistently have made only one loan per borrower per year, while in another the institutions may just as consistently have made more than one. This difference would affect the size of the average loan in each region because the survey asked for the amount of the borrower's first loan, not for the total loans in the fiscal year.

EXTENT OF DEPENDENCE ON LOANS, JOBS, AND SCHOLARSHIPS. Every region had a large number of borrowers who were financing all or most of their education by means of loans, jobs, and scholarships. The West had the largest ratio—1 in 3—who were financing *all* their education by these means; the East had the smallest—1 in 4. The South had the largest ratio—1 in 3—who were financing *three-fourths* of their expenses so; the East had the largest ratio who were financing *one-half*.

Grade composition in the public schools

Differences in the grade composition of the public school system now (in 1958-59) and 35 years ago indicate some of the changes that have taken place:

The percentage of the total school enrollment in kindergarten is twice as large as in 1923-24—a direct result of the increased number of kindergartens in the public schools.

The difference in size between the first and second grades is narrower, indicating that retardation in the first grade has been greatly reduced, partly as a result of more kindergartens.

The next 4 grades also are more of a size: In 1923-24 the 3d grade had 11.6 percent of the enrollment but the sixth grade had only 8.8 percent; now, however, each of the grades from 3 through 6 has about 9 percent.

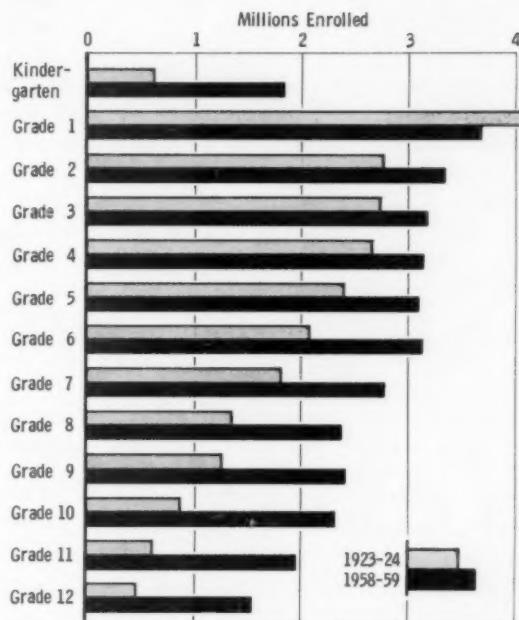
The kindergarten and first 6 grades enrolled 12 percent

Grade	1923-24 ¹		1958-59 ²	
	Number	Percent	Number	Percent
K.....	609,659	2.57	1,834,014	5.27
1.....	4,103,782	17.33	3,678,772	10.57
2.....	2,759,123	11.65	3,345,722	9.61
3.....	2,741,771	11.58	3,179,087	9.13
4.....	2,656,548	11.22	3,141,825	9.03
5.....	2,393,681	10.11	3,099,426	8.91
6.....	2,079,720	8.78	3,135,641	9.01
7.....	1,810,124	7.65	2,785,211	8.00
8.....	1,346,338	5.69	2,381,076	6.84
9.....	1,244,601	5.26	2,412,495	6.93
10.....	862,038	3.64	2,317,913	6.66
11.....	610,279	2.58	1,954,578	5.62
12.....	459,156	1.94	1,537,872	4.42
Total...	23,676,820	100.00	³ 34,803,632	100.00

¹ 48 States and D.C.

² 49 States and D.C.

³ Excluding 35,009 postgraduate students.



less of the total than they did in 1923-34; junior and senior high schools, 12 percent more.

The percentage in grades 9-12 has more than doubled: more than 1 in every 6 pupils is in the last 3 years of high school, compared to 1 in 12 pupils 35 years ago.

Both the chart and table show the public school enrollment by grade in 1923-24 (48 States and the District of Columbia) and 1958-59 (49 States and the District of Columbia; does not include 35,009 postgraduate students).—By Emery M. Foster, chief, Research Studies and Surveys Section.

PART-TIME JOBS. The Central Region had the largest ratio of borrowers working at part-time jobs—7 in 10; the South had the smallest—1 in 2. The West, however, had the largest proportion working long hours at these jobs: out of every 10, three worked 16 to 25 hours a week, and a fourth worked more than 26 hours. In the Nation as a whole every other borrower worked at part-time jobs at least 6 hours a week; and most of the workers reported that their jobs did not seriously interfere with their study time, regardless of the number of hours they worked.

We need additional information before we try to account for these regional differences. We need to know,

for example, how plentiful jobs are in each region, and how willing the borrowers are to take them.

Loan benefits

COLLEGE BECAME POSSIBLE. For many students the loan made college possible. In every region about 9 in 10 borrowers reported the loan as the thing which determined their entering or staying in college. Of those who reported so, 3 in 5 were men. Of those planning to teach, 9 in 10 said the loan was the deciding factor.

FEWER HOURS WENT INTO PART-TIME JOBS. Although in itself reduction of part-time work is of doubtful benefit to the student unless he uses a good deal of his released

time for study, we felt obliged, in our effort to measure the benefits under NDEA loans, to find out how much the loans enabled students to cut their part-time work.

Western borrowers—naturally enough, since they worked the longest hours—reported the greatest benefit on this score. Three in 5, in contrast to 1 in 2 in the South, said they were enabled by the loan to reduce their hours of part-time work.

PART-TIME STUDENTS BECAME FULL-TIME. The West also had the largest number of borrowers who had been enabled to change from part-time to full-time students. One in 5 reported this benefit in the West, compared to 1 in 10 in the East and 3 in 20 in the Nation as a whole.

This advantage to westerners may be due to the fact that the West had the largest proportion of part-time students to start with.

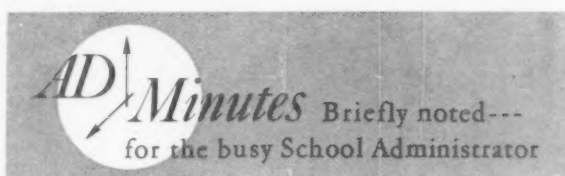
A BRIDGE WAS BUILT BETWEEN HIGH SCHOOL AND COLLEGE. In each region about 8 in 10 of the freshman borrowers reported that they had been promised a loan either while they were still in high school or shortly after they graduated. In other words, for the great majority of students the time of indecision either had been eliminated or had been made very brief.

This is a consistently good record of early loan commitment, but it could be even better. It may be better than it looks, however: some of the borrowers who reported no early promise of a loan may have had faulty memories; and some may have applied for loans so close to the beginning of college that they did not acknowledge the promise as having been made before entrance.

The most different region

On most counts the western borrower was the one who stood out most sharply from the plateau of averages. Many of his distinguishing features, however, were natural concomitants of each other: his being oldest, for example, was a basic part of his being farthest along in college, married, and the parent of the largest number of children. And perhaps it was also a basic part of his staying closest to home in his choice of college.

Although many of his distinctions were either his own or bestowed by his family, perhaps just as many were the result of preferences built into the administrative policies of the college that had selected him to receive a loan. The fact that all this can be said about the distinctions of the other borrowers, too, suggests the inter-relatedness of these differences generally and holds out the hope that as we search for the reasons behind any one difference we at the same time move closer to an understanding of them all.



Student expenses. The average high school student in Oregon spends \$238 a year on school activities even though his textbooks and regular school supplies are provided free. A Portland State College survey cites these as typical items in his expense account: Class jewelry, athletic tickets, activity fees, proms and other social affairs, gym shoes and sweat-shirts, laboratory and shop materials, student pictures, injury and accident insurance, field trips, and college entrance examinations.

★ ★ ★

Still short. New Jersey's schools have doubled their debt for school construction in the past 5 years. But even with the increase from \$365 million to \$744 million, they are still short of classrooms.

★ ★ ★

For better PTA-school relations. In Cincinnati a committee of principals, teachers, and officers of the Elementary School Council of Parent-Teachers Associations has produced a handbook, *Strengthening the Working Relationships of the PTA and the Elementary School*. The handbook will serve as an aid to PTA officers and school personnel.

★ ★ ★

For safe transportation. This year it will take more than 160,000 school bus drivers to carry some 13 million children (about 7 million more than in 1950) back and forth to school, and States will spend more than a half billion dollars to do the job. Although local school authorities are responsible for selecting drivers, the State education agencies set up the general standards for employment—for example, on minimum and maximum age, physical condition, experience, and character.

As the number of pupils transported has increased and traffic and highway problems have become more severe, both State agencies and local schools have tightened their policies and raised their standards for selecting drivers. Already their action has brought results. For example, in 1959 the Georgia State Board of Education ruled that drivers over 65 or physically handicapped could not be employed. When the new regulations were put into effect and more rigid tests were given, 252 previously employed drivers failed because of physical defects such as missing limbs, eye or ear handicaps, heart ailments, or other disabilities. Since then, the percentage of bus accidents resulting from the drivers' errors of judgment has been reduced from 38 to 18 percent.

Other States too are reducing accidents, but, since one accident is too many, there is still room for great improvement. With educators and national safety experts pooling their ideas on recruiting, selecting, supervising, and training school bus drivers, as they did recently at the 48th National Safety Congress and Exposition in Chicago, school children should ride more safely next year.

★ ★ ★

Shakeup in teacher preparation. A report, *Guidelines for Preparation—Programs of Teachers of Secondary School Science and Mathematics*, has been issued under the sponsorship of the American Association for the Advancement of Science and the National Association of State Directors of Teacher Education. The report recommends that all students preparing to teach these subjects be required to follow a common program that includes sufficient study in a major to undertake graduate work, a fifth-year program with emphasis on the major, methods courses applicable to the subject to be taught, and emphasis on a thorough college-level study of subjects in the major which are included in the high school curriculum. This last proposal is designed to end the practice of requiring a specified number of semester hours in the subjects to be taught and instead to provide a qualitative basis for teacher certification.

★ ★ ★

Recent court decisions. Three court decisions may have far-reaching implications for the Nation's school systems.

In New Rochelle, N.Y., the U.S. Court of Appeals upheld the original decision by a Federal district judge to permit a pupil to transfer from one school district to another of his choice within the school community.

A Federal court in Louisiana ruled as unconstitutional a State legislative act which would have permitted residents of St. Helena Parish to close their schools to avoid desegregation. The ruling declared that public education remains the concern of the State government and that in respect to education, "the State can no more delegate to its subdivision a power to discriminate than it can itself directly establish inequalities."

In Virginia, a Federal district judge declined to order the Norfolk school board to assign pupils solely on a geographical basis. He also said that academic tests given only to Negro applicants prior to assignment (a practice which the plaintiffs asked to be prohibited) should be abandoned "gradually and pleasantly." He added that in his opinion this goal will be reached in 4 or 5 years.

★ ★ ★

Only 15 cents per dollar. Educational expenditures, as classified by the Bureau of the Census, took only 2 cents out of each Federal tax dollar in fiscal year 1960, 33 cents out

of each State tax dollar, and 45 cents of each local tax dollar. Out of the tax dollar from all sources—Federal, State, and local—education took an average of 15 cents. These averages are the same as in the year before, with one exception: in 1959 two cents less of the State dollar went into education.

Federal payments to State and local governments for all purposes amounted to \$6,972 million in fiscal year 1960, which represents 11 cents of each dollar available to State and local governments. The 1960 percentage is a decrease from the all-time high of 14 cents in 1959, but is above the average of 10 cents of each dollar available to State and local governments from Federal sources during the 1950's.

★ ★ ★

Regional schools. New Jersey now has 33 regional high schools; 8 of them opened their doors last year. These large school units have the advantage over small units in that they are financially able to offer comprehensive curricular programs to students with diverse educational and vocational goals.

★ ★ ★

Florida teachers for Florida schools. Less than a sixth of the new teachers employed in Florida have been trained there. Gifford Hale of the State University has called for a doubling of the number of Floridians preparing to teach in elementary and junior high schools, for strengthening existing preparatory programs, and for increasing the number of programs.

★ ★ ★

One of nine. Erling O. Johnson will become commissioner of education for Minnesota on Jan. 1, 1962, replacing Dean M. Schweickhard, who will retire at the end of this year. Last month we inadvertently omitted Minnesota—and just as inadvertently included Mississippi—in our list of the 9 States that in 1961 got new chief State school officers. (The other States are Alabama, Colorado, Iowa, Oregon, Utah, Virginia, Washington, and Wisconsin.)

★ ★ ★

Less State money. Local schools in New Mexico get most of their funds from the State government. With less money from the State available in 1961-62 than last year, local schools must find new sources of income or cut down on expenditures. In the meantime they are struggling with larger classes, cutting or curtailing enrichment programs, and losing their teachers to higher paying jobs elsewhere.

★ ★ ★

First priority. Of the \$90 million increase the 1961 Florida Legislature made in appropriations for first priority services, \$64 million, or 71 percent, went to education—kindergarten through junior colleges.

Analysis of standards for guidance programs under NDEA

WE CANNOT now be satisfied with any educational endeavor that is not genuinely committed to the highest standards of which we are capable." When he made this statement before a Congressional subcommittee last spring, Commissioner McMurrin was asking the public to focus its attention on quality education as a national goal. As a national goal, quality in education is worth our closest attention and our united effort, for it is essential to the achievement of national strength and to the full realization of the individual's greatest potential.

For the last 3 years, under the National Defense Education Act of 1958, local, State, and National interests and resources have been united in an effort to improve the quality of American education. One phase of that effort is directed at improving and expanding guidance, counseling, and testing programs in public secondary schools.

The guidance, counseling, and testing program conducted under NDEA is truly a united effort: The Federal Government allots funds to participating States (\$15 million a year for 6 years on a matching basis) and approves State plans for participation; State education agencies make program plans, set standards and requirements for local school participation, stimulate local interest, and organize and supervise local programs; local schools conduct programs and employ guidance workers to assist students in identifying their abilities, advise them on their educational and vocational plans, and encourage them to develop their talents.

The NDEA program is now in its fourth year and we can take stock of the progress States and local schools

have made toward their objectives, using their own plans and annual reports to the Office of Education as a guide.

State agencies have used between 80 or 90 percent of their funds in establishing, maintaining, and improving guidance programs in local schools and the rest in giving leadership and supervision to State plan programs and in purchasing scholastic aptitude and achievement tests to be given to secondary school students.

Apparently the agencies have used their funds effectively, for new programs have been organized and old programs extended. For example, one large State has extended and improved guidance services in 68 percent of its secondary schools and State specialists have consulted with workers in more than 50 percent of the schools.

Both State agencies and local schools have added persons professionally trained in guidance and counseling to their staffs, as this tabulation shows:

IN STATE AGENCIES

Before NDEA (June 30, 1958) in 48 States and Territories:	
Full-time guidance workers.....	69
Part-time guidance workers.....	30
Two years later (June 30, 1960), in 54 States and Territories:	
Full-time guidance workers.....	156
Part-time guidance workers.....	99

IN LOCAL SECONDARY SCHOOLS

Before NDEA (September 1958) in 48 States and Territories:	
Guidance supervisors:	
Full-time.....	1,156
Part-time.....	1,605
Counselors:	
Full-time.....	6,009
Part-time.....	12,160
Two years later (June 30, 1960), in 54 States and Territories:	
Guidance supervisors:	
Full-time.....	1,239
Part-time.....	1,586
Counselors:	
Full-time.....	9,247
Part-time.....	20,079

All together, in the first 2 years of the NDEA program, the number of guidance counselors increased by more than 50 percent. In the third year, for which data are now being compiled, the increase continued: one Ter-



Mr. Crummel, specialist, State plan and program analysis, in the Division of State and Local School Systems, has been a teacher, school administrator, and staff assistant to the president of the American Council on Education. He is the author of the statistical study "Development of Higher Education in

the United States, 1900-1955," published by the Educational Record, October 1957, and "Administration of title III: The man and the job," published by School Life, December 1960.

ritory, for example, reported that in 1960-61 the number of its counselors increased 45 percent over the year preceding—from 124 to 179. Despite the increases of the past 3 years, however, and the increases that continue to take place in this the fourth year of the program, the Nation still has a shortage of qualified counselors, now estimated at more than 18,000.

The gap between the demand and supply of counselors is being slowly bridged as more persons become qualified; moreover, as more schools provide guidance services that are more than part time, they attract more persons to guidance as a profession.

To insure quality in their expanding programs and services, all States have set minimum standards (those a local program must meet to participate) and recommended standards (those a participating program must work toward each year) both for counselor qualifications and for counselor-student ratios.

By comparing the minimum and recommended standards set for the qualifications of counselors, we can see the progress the States hope to make:

<i>Qualifications</i>	<i>Number of States</i>
<i>As a Minimum Standard:</i>	
State agency approval—no particular number of hours specified.....	1
Three hours of work and annual progress toward counselor certificate.....	1
Unspecified number of hours of work toward counselor certificate.....	1
Provisional, professional, endorsement, or regular certificate	23
Six semester hours in graduate guidance courses.....	13
Ten to 25 semester hours in graduate guidance courses	15
Total	54
<i>As a Recommended Standard:</i>	
Twelve to 18 hours in graduate guidance courses.....	9
Major in guidance.....	1
Master of arts degree, with guidance courses.....	3
Professional, endorsement, or regular type certificate.....	41
Total.....	54

As this tabulation shows, 23 States required some kind of a guidance or counselor's certificate as a minimum standard for local programs seeking State approval as an NDEA program; 31 States required no such certificate.

A number of States have yet to develop certification standards for school counselors—in 1960 eleven States did not require certification. Some of these States have made considerable progress in developing standards for the approval of counselors in local programs. Since

NDEA a number of States have developed or are developing certification requirements.

Although the States still have a long way to go to reach the generally recommended counselor-student ratio of 1:300, they are making progress. In fiscal year 1958, the national ratio for all high schools was about 1:750; in 1959 it was about 1:680, in 1960 it was 1:610, and in 1961, an estimated 1:550.

We should bear in mind that States will not be able to reach the ratio of 1:300 under NDEA-approved programs until qualified counselors are available. In the meantime, however, they are working to reduce counselors' work loads, as these State-plan standards show:

<i>Number of students per counselor</i>	<i>Number of States</i>
<i>AS A MINIMUM STANDARD</i>	
1,000 and more.....	10
700-800.....	4
600-700.....	17
500-600.....	14
400-500.....	16
Not specified.....	3
Total.....	54
<i>AS A RECOMMENDED STANDARD</i>	
900-1,000.....	1
600-700.....	5
500-600.....	8
400-500.....	14
300-400.....	19
200-300.....	6
100-200.....	1
Total.....	54

¹ Of the 6 States in this range, 2 had a counselor-student ratio slightly above 1:400 and 4 had a ratio of exactly 1:400. In other words 47 States had minimum ratios above 1:400.

² Of the 14 States in this range, 7 were slightly above a ratio of 1:400 and 7 States had a ratio exactly at 1:400. In other words, 33 States recommended ratios of 1:400 or less.

It is estimated (on the basis of reports from 28 States) that during school year 1960-61 between 70 and 75 percent of the Nation's public secondary schools were participating in guidance programs. Most of the others have for various reasons been unable to meet State standards for participation—many of them are schools with small enrollments. But even the nonparticipating schools, including nonpublic secondary schools which are not eligible for this phase of the program, have been influenced by NDEA to increase their emphasis on quality and quantity in guidance programs.

As local guidance counselors work to achieve State

recommended qualifications, they are strengthening their professional competencies and equipping themselves to do a better job of counseling with students. At the same time guidance services are being extended and

fewer students are being served by one counselor. In this way counselors are able to devote more time to individual students and, as a result of their training and experience, to give better service.

Vocational Education Acts On Review

TWENTY-SIX LEADERS in agriculture, education, industry, and labor, recently named by Secretary Ribicoff as consultants on vocational education, held their first meeting in the Office of Education, Nov. 9-11. Their job is to consider plans for updating and improving vocational education—and there is no more important job in all education, Secretary Ribicoff told them. Others share the Secretary's opinion: President Kennedy, who has called Congress' attention to the need for reviewing the national vocational education acts; U.S. Congressman Fogarty, who says the time is ripe for abandoning the piecemeal approach to this problem; and Commissioner McMurrin, who says that the Nation can no longer afford to waste the abilities of large numbers of people through inadequate or faulty training.

The consultants too recognize that the job needs to be done. Benjamin C. Willis, general superintendent of Chicago public schools and chairman of the panel of consultants, has pointed out the need for stressing problems of automation.

During the 3-day sessions the consultants heard Seymour Wolfbein, Deputy Secretary of Labor, discuss manpower needs in the 1960's and Walter M. Arnold, Assistant Commissioner for Vocational Education, and his staff discuss the current vocational programs of the Office of Education. In addition, the consultants made plans for going on with their work, including a number of

informal conferences with agricultural, labor, and industrial groups in their areas and another 3-day panel meeting.

An Office staff has been appointed to assist in the work of the panel: J. Chester Swanson, principal adviser; Noel T. Myers, deputy director; and Mary P. Allen, assistant director. Members of the panel are listed below:

Mrs. Mary Caperton Bingham
Lay leader, Lexington, Ky.

Hyman H. Bookbinder
Special Ass't to the Secretary
U.S. Dept. of Commerce

Charles F. Carroll
State Supt. of Public Instruction
(N.C.)

Frederick T. Corleto, Corleto
Buick Agency, Philadelphia

Ernest H. Dean, Speaker
Utah House of Representatives

Mark Ellingson, president
Rochester Institute of Technology

Mrs. Margaret C. Ells
Scholarship Counselor
American International College

Chas. Wm. Engelhard, Jr.
Chairman of the Board
Engelhard Industries (N.J.)

Edward B. Evans, president
Prairie View Agricultural and
Mechanical College (Tex.)

Henry A. Gonzales
State Supervisor of Trade and
Industrial Education (N. Mex.)

Francis A. Gregory, director
Vocational Education
D.C. Public Schools

Jerry R. Holleman
Ass't Secretary of Labor
U.S. Dept. of Labor

Floyd D. Johnson, teacher
Vocational agriculture
York (S.C.) Public Schools

Helen R. LeBaron, dean
College of Home Economics
Iowa State University

Wm. B. Logan, director
Distributive education institutes,
Ohio State University

Charles Odell, director
Retired and Older Workers
Dept., International Union of
the United Auto Workers

James Patton, president
National Farmers Union

J. B. Perky, director
Vocational Education
State Dept. of Education
(Okla.)

Thos. H. Quigley, head
Industrial Education Dept.
Engineering Extension Division
Georgia Institute of Technology

Mrs. Helen Radke, member
Board of Education
Port Angeles (Wash.) Public
Schools

Peter T. Schoemann, president
United Association of Journeymen
and Apprentices, Plumbing
and Pipefitting Industry

Theodore Schultz, chairman
Dept. of Economics
University of Chicago

Paul H. Sheats, dean
University Extension
University of California (L.A.)

Benjamin C. Willis, supt.
Chicago Public Schools

Dael Wolfe, executive officer
American Association for the
Advancement of Science

E. T. York, director
Federal Extension Service
U.S. Dept. of Agriculture



Four leaders who met with the panel on vocational education are, from left to right: Benjamin C. Willis, General Superintendent of Schools, Chicago; Sterling M. McMurrin, U.S. Commissioner of Education; John E. Fogarty, U.S. Congressman from Rhode Island; and Wilbur Cohen, Assistant Secretary for Legislation, U.S. Department of Health, Education, and Welfare.

Project English

We are convinced that adequate instruction in reading and in the written and oral use of the English language is a matter of utmost importance among our national needs.—
U.S. Commissioner of Education McMurrin, speaking at a Senate appropriations hearing, April 1961.

PROJECT ENGLISH has been launched in the Office of Education. The 87th Congress has given the Office of Education budgetary support for a project to help raise the quality of the English curriculum and English instruction. Through the combined efforts of the professional staff of the Office, Project English will seek to complement, reinforce, and strengthen the contributions being made by public schools, institutions of higher education, State departments of education, professional and scholarly organizations, private foundations, and other groups. In consultation with representatives of these agencies and groups, the Office will sponsor research studies and experiments and will contract with universities or State departments of education for the establishment of curriculum centers to plan, develop, and test new instructional materials and methods. For these sponsored, or extramural, activities in this fiscal year approximately one-half million dollars are available.

Acting in liaison with these agencies and groups, the Office will engage in the following activities:

1. Determine the status of research and experimentation and spotlight phases that need further research and experimentation.
2. Sponsor and support research and development projects through its Cooperative Research Program.
3. Serve as a clearinghouse of information on research and development, that is, information flowing from studies under the Cooperative Research Program and from the efforts of other organizations and agencies.
4. Serve as a cooperative planning center to insure the maximum impact of and continuity in the efforts of the educational community as a whole to upgrade performance in English.

In brief, Project English encourages both study and action: it seeks to discover, define, and study the problems involved in improving English instruction, and, at the same time, to put to more vigorous use the knowledge we already have about how to improve it.

During its initial stage the project will emphasize reading, composition, and related skills, since the need for im-

provement in these skills is nationally recognized and the congressional appropriation implies a high interest in them. Throughout the Project, however, the Office will attempt to provide financial support for the most promising proposals, including those concerned also with the teaching of literature.

Project English encompasses all levels from the kindergarten through the graduate school, though the most promising levels to examine at this time seem to be the elementary and secondary schools and probably the freshman and sophomore years of college. As has been pointed out repeatedly, one of the greatest weaknesses in the usual English program is the lack of articulation or sequence of content. Unnecessary repetition of subject matter often handicaps the student as he moves from elementary school to junior high school, to senior high school, and even into college. This is a problem which may be aggravated by the success of the Advanced Placement Program in English in hundreds of high schools and the general upgrading of content for the college-bound student.

Still another problem at these levels is the need for more preservice and inservice education of English teachers. These teachers need the kind of institutes now provided for teachers of modern foreign languages under the National Defense Education Act and for teachers of science and mathematics under programs of the National Science Foundation, but legislative proposals which would authorize such institutes in English have not been enacted into law.

A number of programs of the Office of Education in related fields will be coordinated with Project English. One of these is a major project to improve the teaching of reading in elementary and secondary schools. As a first step the Office is collecting and evaluating data on research in reading completed between 1955 and 1960 at colleges, universities, and research centers within the United States. Using these and other research findings, specialists are writing bulletins on various aspects of read-

SCHOOL BONDS—

Sales, Interest Rates, et cetera

A monthly report by ELMER C. DEERING, Office of Education specialist on financing school facilities

MORE THAN 2.3 billion dollars worth of bonds were sold for public school purposes in the 1960-61 school year, \$162 million or 7.4 percent more than in 1959-60. Delayed reports may increase the 1960-61 total slightly but not enough to equal the \$2.4 billion sold in 1957-58. Issuing agencies made 2,639 sales, averaging \$893,000 each, in 1960-61 as compared with 2,674 sales, averaging \$821,000 each, in 1959-60. The tabulation below shows the distribution of the 1960-61 bond sales for public school purposes by issuing agencies:

Issuing agency	Number of sales	Volume	Percent of total	Average per sale (thousands)
State.....	43	\$236,382	10.0	\$5,500
County.....	87	132,842	5.6	1,530
City, town, township..	208	241,688	10.3	1,162
School district.....	2,122	1,565,285	66.4	738
Authority.....	179	180,708	7.7	1,010
All agencies.....	2,639	2,356,905	100.0	893

ing for classroom teachers, supervisors, and administrators. The Office also plans to work, as staff becomes available, in the area of supervision and the improvement of instruction for underachieving in-migrant pupils who are severely retarded in reading and language ability.

Many institutions and agencies will become directly involved in Project English through the Office of Education's Cooperative Research Program. Under this program the Office receives annual appropriations "to enter into contracts or jointly financed cooperative arrangements with universities and colleges and State educational agencies for the conduct of research, surveys, and demonstrations in the field of education." Contracts may also be made for the organizing and synthesizing of existing research findings and for conferences and seminars of research people for the purpose of stimulating research and developing research designs.

Proposals for research projects under the Cooperative Research Program must be submitted to an advisory com-

Average net interest cost of Moody-rated bonds sold on the primary market for public school purposes, July 1960 to July 1961, by rating

Period	Aaa	Aa	A	Baa	Ba	All rated bonds
1959-60.....	3.26	3.63	3.77	4.21	4.55	3.84
1960-61.....	2.82	3.34	3.43	3.75	3.97	3.48
1960:						
July.....	3.08	3.37	3.72	4.00	4.47	3.78
August.....	2.81	3.01	3.47	3.73	4.22	3.47
September.....	2.66	3.56	3.48	3.80	4.41	3.51
October.....	3.26	3.54	3.90	3.63
November.....	2.78	3.13	3.39	3.78	4.13	3.44
December.....	2.80	3.09	3.45	3.78	4.18	3.51
1961:						
January.....	2.66	3.57	3.39	3.79	3.66	3.52
February.....	2.85	3.16	3.22	3.50	3.80	3.27
March.....	3.12	3.19	3.44	3.70	4.06	3.46
April.....	3.20	3.38	3.73	4.28	3.43
May.....	2.92	3.22	3.31	3.70	4.02	3.37
June.....	3.01	3.19	3.44	3.65	4.15	3.47
July.....	2.97	3.25	3.37	3.73	4.21	3.41

Source: The Investment Bankers Association, which reports with a Moody rating all sales by issuing agencies (school districts, States, counties, cities, towns, townships, and schoolbuilding holding companies) that had more than \$600,000 worth of bonds outstanding at the time of sale—in other words, about 75-80 percent of all sales. Each month the figures are adjusted to include sales reported too late for inclusion in the month preceding.

mittee of experts appointed from outside the Office by the Commissioner of Education. Before being submitted to this committee, proposals bearing on Project English will, however, be reviewed by an advisory panel of specialists in English at the elementary, secondary, and college levels. Present members of the panel are Theodore Clymer, Robert Pooley, and Albert Kitzhaber.

Project English will provide for the development of new instructional materials and methods through curriculum study centers to be established at selected universities. Three such centers are provided for by the budget for fiscal year 1962; two more are planned for the fiscal year beginning July 1962. They will be established by contract through the Cooperative Research Program.

The study centers will provide tangible resources for the improvement of instruction. In cooperation with State and local educational leaders they may—

(1) Consider the present aims and nature of the English curriculum and propose means of strengthening it.

(2) Develop a pattern for teaching reading, composition, and related language skills that has a sequence based on research in human growth and development and the teaching-learning process.

(3) Test promising practices and materials.

(4) Make recommendations for the curriculum and develop materials adaptable to school and college programs of instruction.

The Office's attitude toward instructional practice in English is the same as it is toward other aspects of education in the United States. In Project English, as elsewhere, the Office seeks to preserve the plurality in our educational system; it does not intend to secure the adoption of a particular curriculum; rather, it hopes to stimulate throughout the Nation an enterprising attitude toward improvement by supporting diverse kinds of promising activities. Universities and State departments submitting proposals for the establishment of centers may define their areas of concern by grade level, skill, student clientele, or on any other base or combination of bases. A center may focus, for example, on language development in grades 1-6, or on reading in the secondary school, or on articulation in composition and literature between high school and college, or on teaching English as a second language to children in large cities.

Each center will have from 3 to 5 years in which to complete the task with which it is charged, but it will be expected to issue new curriculum materials as they are developed. One of the activities of a center will be to evaluate its newly prepared materials in classrooms. This field-testing activity, while a form of demonstration project, will not constitute a dissemination effort, since the authority under which the Cooperative Research Program operates does not extend to general dissemination.

Project English is under the direction of Assistant Commissioner Ralph C. M. Flynt, director of the Division of Statistics and Research Services. Other divisions of the Office are connected with the project through an interdivisional committee representing all participating units of the Office—the sections concerned with the instructional programs of elementary, secondary, and higher education; the Cooperative Research Branch; the Library Services Branch; and the sections working on language development programs of the National Defense Education Act. This committee serves in an advisory and liaison capacity.

Anyone wishing to propose a research project or to ask how to prepare his proposal should address himself to Francis Ianni, Cooperative Research Branch, Office of Education, Washington 25, D.C.

Compared to the money and effort expended in the past few years for science, mathematics, and modern

Government Heads Meet With Educators of Adults

TEN GOVERNMENT AGENCIES and the White House became part of the 10th annual conference of the Adult Education Association of the USA, held in Washington, D.C., November 5-8. In doing so, they dramatized the chief idea of this year's conference—the idea that Government, being of, by, and for the people, perforce reflects the wisdom, or lack of wisdom, in the people; and that the people have a responsibility for shaping public policy. This idea was implicit in the conference theme—"Education for citizen participation in the quest for peace"—and to it all other topics of the conference were related, whether they had to do with cultural interchange, automation, reading programs, education for family life, or the use of television. Chester Bowles, speaking before the conference, sharpened this idea with his questions: "Do we clearly understand the nature of the struggle? At this crucial moment in history, what precisely do we Americans seek? In other words, what is our national purpose?"

The Government agencies made their contribution on the second day of the conference, when each received a group of leaders in adult education selected in advance of the conference. The visitors and the top staff of the agency spent a half-day together considering both the responsibilities and duties of the agency and the dependence of the agency on a well-informed public. At the Department of Health, Education, and Welfare, for example,* the educators met with Ivan A. Nestingen, the undersecretary; Oliver H. Caldwell, Office of Education; Eugene H. Guthrie, Public Health Service; and Cecile Whalen, Social Security Administration.

Another indication of the cooperation between leaders in Government and leaders in education is the fact that this year the Adult Education Association made Ambrose Caliver its president. Dr. Caliver is assistant to the U.S. Commissioner of Education and chief of the Adult Education Section, Office of Education.

* The other agencies were the Departments of Agriculture, Commerce, Defense, Interior, Labor, and State and the Federal Communications Commission, Atomic Energy Commission, and National Aeronautics and Space Administration.

foreign languages, the outlay for Project English is modest indeed. However, one might hope that with the assistance of English teachers and scholars, professional and scholarly groups, schools, colleges, and universities, private foundations, and the public in general this first concerted national effort to strengthen instruction in English will be extremely beneficial to students, teachers, and the Nation as a whole.

National economy and public education move together

The newly formed Organization for Economic Cooperation and Development built its first conference around the theme "Economic Growth and Investment in Education." Here is a three-part presentation of the conference: Background, an abstract of the conference summary report, and notes by an observer.

1. Background

REPRESENTATIVES of 20 countries of the newly constituted Organization for Economic Cooperation and Development (OECD) met for a policy conference on "Economic Growth and Investment in Education" in Washington, D.C., Oct. 16-20.

The participants represented the finance and education ministries of each member country of OECD: Austria, Belgium, Canada, Denmark, France, Germany, Greece, Iceland, Ireland, Italy, Luxembourg, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, Turkey, United Kingdom, and United States. Yugoslavia, a participant in some programs of OECD, sent an observer. Philip Coombs, Assistant Secretary of State for Educational and Cultural Affairs, served as chairman. For the United States, the Department of State was represented by Manuel Abrams, Office of European Regional Affairs; the Bureau of the Budget by David E. Bell, Director; the Council of Economic Advisers by Kermit Gordon, Member; the International Cooperation Administration by James P. Grant, Deputy Director; the Department of Health, Education, and Welfare by Sterling M. McMurrin, U.S. Commissioner of Education; and the National Science Foundation by Alan T. Waterman, Director. Theodore Schultz, professor of economics, University of Chicago, served as an adviser to the American delegation.

The Organization for Economic Cooperation and Development began its official existence on September 30, 1961, when it took the place of the 13-year-old Organization for European Economic Cooperation. The change in title from OEEC to OECD—the substitution of the word "development" for "European"—reflects the fact that two non-European countries—the United States and Canada—have become full members; and that in the future the Organization will put emphasis on developmental aid.

Both the reconstitution of the Organization and the recent conference mark the changes that have taken place

since the OEEC was set up in 1948 to administer Marshall Aid and to restore the European economy on a cooperative basis. Walter Heller, Chairman of the U.S. Council of Economic Advisers, in an address to the policy conference called its title "a sign of our times":

"The recognition now accorded education and the development of human resources for the promotion of economic growth have made necessary this title. A decade ago the period would have come after the word 'investment'; the title would have been: 'Economic Growth and Investment,' and the representatives here gathered would have met in separate conferences. It is only in the last few years that there has been a revival of interest among economists in the subject of human capital and its productivity, as distinguished from labor and its utilization."

This "revival of interest among economists" in the contribution of education to the economy and economic growth, which provided an impetus for the meeting, also determined the questions of policy to be discussed:

I. What are the dimensions and principal characteristics of the task facing education in the next decade to meet the needs of social and economic progress in OECD countries? More specifically: How much of the current national output must be ploughed back into education to insure future development? What internal adjustments must be made and what priorities adopted to provide society with the kind of educational structure it will need? Given the fast-growing burden of educational expenditures, how can educational funds be spent to the best advantage of the community?

II. In addition to meeting their own need, what should OECD countries do to respond to the needs and requests of the underdeveloped countries, bearing in mind their even greater task of educational expansion? More specifically: What are their future needs for education in science and technology? What is the nature of the task? What

policy problems does this situation create for the OECD countries?

III. What are the implications of these two problems for planning? More specifically: What should be the dimensions and strategy of expansion? What machinery of planning should be employed to achieve such expansion?

In their discussions of these questions the conferees had the benefit of working documents and reports and the advice of their authors. The principal report was *Target for Education in Europe—A Study of Policy Considerations Related to Economic Growth*, by Ingvar Svennilson, professor of economics, University of Stockholm; Frederick Edding, Department of Economics, Institute for International Education Research, Frankfurt, Germany; and Lionel Elvin, Director, Institute for Education, University of London.

This report, which was prepared to aid the conferees in discussing the relation of education to the economy, uses statistics from member countries to document facts on these points: How much of a country's resources should be given to education? When resources have been allocated to education, how should they be distributed among elementary, secondary, and higher education? Between general and special education? Once a country has established educational priorities, how should it plan for expansion, considering the factors exogenous to education, such as population trends and the economy to be served?

Three working documents also had been prepared as case studies of planning in countries with different political, economic, and administrative systems:

For France, a liberal economy with centralized administration of schools, by Raymond Poignant, Member of the State Council, Rapporteur-General of the National Committee for Schools and Universities, National Planning Committee.

For Sweden, a social welfare economy with central educational policy and a devolution of administrative responsibility, by Sven T. Moberg, Head of the Department, Ministry of Education and Ecclesiastical Affairs.

For Yugoslavia, a socialist economy with decentralization of education, by Moric Elazar, Head of the Department for Education Investment Planning, Federal Secretariat for Education.

Five discussion papers dealt with the response of OECD countries to the requests of underdeveloped countries:

Global Demand for Education in Underdeveloped Countries, by J. Tinbergen, Director, Netherlands Economic Institute.

The Strategy of Human Resource Development, by Frederick Harbison, professor of economics, Princeton University.

Priorities for Education Expansion in Underdeveloped Countries, by Arthur Lewis, Principal, University College of the West Indies.

Some of the Main Issues in the Strategy of Educational

Supply, by John Vaizey, Director of Research Unit in the Economics and Administration of Education, University of London.

Study Abroad As It Affects OECD Member and Associated Countries, by the OECD Secretariat. Mainly a statistical study of the number of foreign students in OECD countries in relation to the capacity of higher educational institutions.

Three background documents, while not used for discussing the major policy questions, summarized discussions between educators and economists on the importance of education to economic development:

"Some Economic Aspects of Educational Development in Europe," published by the International Universities Bureau, a report of a conference organized by the International Association of Universities and sponsored by the Ford Foundation, at Bellagio, Italy, in July 1960.

"Ability and Educational Opportunity in a Modern Economy," a report of a conference organized by OEEC and held at Kungälv, Sweden, in June 1961.

"Education and Economic Growth," a report submitted by the U.S. Delegation to the OEEC Economic Policy Committee in July 1961.

These three documents included some of the discussions at meetings of an OEEC study group on the economics of education. Seymour Harris, professor of economics at Harvard University, and Thomas Mills of the National Science Foundation attended some of the meetings as observers.

The following text is an abstract of the summary report making policy suggestions for OECD countries to consider in developing their own education and expanding their assistance to underdeveloped countries.

2. Summary report

Fundamental changes are taking place in the conditions under which social and economic progress is achieved. On the one hand, science and technology are creating power to accumulate national wealth of a new order of magnitude; on the other hand, the political ideas and social policies for applying such wealth to social ends are in a state of ferment.

These changes are reflected in new trends in economic thinking. Deeper understanding of the forces affecting long-term economic and social progress is leading to recognition of investment in education as an indispensable prerequisite of future economic growth.

From the standpoint of education, there is also growing attention to the economic implications of the educational efforts being urged in the various countries. It is universally accepted that education—within the capacity of the individual—is a human right, justified by its cul-

tural purposes alone and not to be subordinated to economic needs. But the realization of this right is limited by the available resources and by the way in which society allocates resources between competing demands. It is only with economic advance, itself dependent on education, that a nation can progressively give more substance to the ultimate ideal of equal opportunity for every individual to develop his latent ability through learning.

During the decade of the 1960's, these economic and social needs will lead to a major expansion of education in all countries. Such expansion will become an essential driving force in further social and economic progress. New concepts and policies will need to be formulated and applied to energize and direct this expansion.

The Needs of Member Countries

The relationship between education and the economy

The report, *Targets for Education in Europe*, makes a valuable contribution to the assessment of the present situation, the prospects, and the objectives for education in Europe, but an international survey of this kind cannot reflect, except in a general way, the attitudes, facts, and policies of individual member countries; and the projections of the type it presents cannot replace more specific national investigations.

Should expenditures on education be viewed as a consumption or investment? These two aspects of educational spending cannot be disassociated and increased spending on education will be in response to both demands. Education is important to daily life in that it equips people for leisure and for the fulfillment of their duties as citizens in a democratic society. Education is also vital from the point of view of productivity and economic growth; and from this point of view it is an investment as important as an investment in fixed capital; indeed, investment in real capital not supported by an investment in education is less productive than it might otherwise be.

Assessment of future needs

The statistical sections of this report are restricted to quantitative measurements of students, teachers, and expenditures. It should be emphasized, however, that a quantitative development of the educational system may reflect very different patterns of change in organization, in institutions, and in the qualitative characteristics of education; and that since a given sum spent on education might yield different results, depending on the efficiency, methods, and general directions of teaching, it is essen-

tial to consider how to make teaching more efficient. A mere multiplication of quantities on the basis of present patterns might imply conservatism of teaching and organization; imaginative reforms of teaching and organization are just as necessary as quantitative expansion.

Irrespective of these considerations of quality and efficiency, the needs for expansion in the OECD area in terms of pupils, teachers, buildings, and expenditures over the next decade are very large. The size of the task in the *European OECD countries* is indicated in these figures:

Age group of students	Increase in students		Increase in teachers	
	Number	Percent	Number	Percent
5-14.....	8,000,000	18	400,000	28
15-19.....	4,500,000	94	280,000	110
20-24.....	800,000	83	50,000	81

(These estimates show only the number of new teachers required to teach the increased number of students; they do not take account of existing shortages or of losses in the next decade due to transfer of occupation, retirement, or death.)

This expansion would, according to the estimates, mean not less than a doubling of educational expenditures from all sources. An expansion of the same relative size in the *United States and Canada* is foreseen.

Such estimates are evidently rough, but should encourage more detailed and accurate national investigations and estimates and provide a basis for them. In the meantime they indicate the size of the task ahead and are reasonable objectives for a balanced effort.

As the figures indicate, the expansion of education in the next decade will be concentrated in *secondary and higher education*, and, in these years there should be a great breakthrough in these fields in most European countries.

If the necessary priority should be given to education, the effort indicated by the goals would not seriously tax the resources of an expanding European economy. If these goals should be adopted, which require a higher proportion of the increased income for education, it may be necessary to examine new methods of public financing and accounting so as to facilitate the allocation of the necessary resources to education.

Though it is not included in the estimates, post-school education (other than university) is an important element in a complete system. Adult education and re-

training are aids to occupational flexibility, help to avoid bottlenecks resulting from shortages of skilled personnel, and are also valuable for those who have not sufficiently developed their abilities during their youth. They are an adjunct to civic education in more leisured societies.

The supply of teachers

The primary obstacle to expanding education in most OECD countries is a serious shortage of teachers, particularly teachers of mathematics and science. Various methods of overcoming the shortage have been suggested, but it is agreed that the only stable solution to this problem is through long-term measures for supplying a larger number of graduates, of whom the necessary proportion would pass through teacher-training institutes. Among immediately effective efforts these are suggested: Improved recruiting methods, upward revision of salaries, scholarships for future teachers, and the attracting of married women back to teaching.

Furthermore it is necessary to increase the effectiveness of teachers by improving teaching methods. Among devices and methods which might be considered are television, correspondence courses, learning machines, team teaching, and the greater use of assistants. None of these should be used unthinkingly, and none is a substitute for the personal influence of the teacher, but they could help husband the rare personnel resources.

The planning of education

If authorities responsible for education are to meet the growing demand, they should give attention to establishing medium and long-term objectives for university and school enrollments and for providing the necessary teachers and buildings. Decisions on financing should, whenever possible, consider long-range programs or plans for education, and not be made solely on a year-by-year basis.

The methods used in making forecasts and programs will vary according to the administrative or governmental structure and the prevailing attitudes toward planning in the country concerned. The establishment of educational objectives should involve local and regional authorities to insure their participation in carrying out the programs agreed on.

Educational objectives should be set in the light of demographic trends, changes in the school-leaving age, and the spontaneous social demand for secondary and higher education. They should take account—particularly for secondary, higher, technical, and professional education—of economic plans, perspectives of the economy as a whole, and the broad effects of economic trends

on the structure and necessary qualifications of the active population (the labor force).

The problems of establishing a balance between the priorities to be given to the different types of specialized professional education should be recognized, for there are often considerable time lags between the carrying out of educational programs and the carrying out of material investment projects. Because of the difficulties and risks in making long-term forecasts of population structure and the frequent changes in techniques and consequently in manpower requirements, programs for technical education should be as flexible as possible and should be based on a wide general education. This will simplify the necessary periodical revision of professional and vocational education.

The formulation of forecasts and programs for developing education in relation to demographic, social, and economic trends is a delicate and complex operation. This task implies that ministries responsible for education will strengthen their development and planning functions in cooperation with the governmental and other groups concerned with research and having responsibilities for advising on the economic allocation of national resources. Valuable experience has already been gained by certain OECD countries in organizing this type of research and development.

It is important for sound educational planning and for developing educational programs—

- a. that there should be excellent statistical data on pupils, teachers, buildings, and finance; and it would seem desirable for them to be internationally comparable;
- b. that regular studies be conducted on all factors relating to future enrollments in schools and universities, including the manpower structure;
- c. that in order to reduce building costs, research should be undertaken into methods of school building.

Assistance to the Underdeveloped Areas

The underdeveloped areas too are faced with the problem of making faster social and economic progress. The preceding observations on the OECD countries may have considerable relevance to their problems, and an understanding of their problems will assist OECD countries in solving their own.

No one doubts the vital role human resources will play in the underdeveloped countries—many of them have already given priority to educational development.

These basic facts on education in the underdeveloped areas are from expert papers (Harbison, Lewis, Pant, Tinbergen, and Vaizey) submitted to the conference: Education must be developed more rapidly in those areas than it has been elsewhere; it cannot be expanded rapidly

with their own resources; rapid expansion can be achieved only by a strategic approach to the development of their own educational systems as part of the long-term strategy of economic and social advance.

Governments and private organizations of advanced countries and international agencies have already given financial and other assistance and are making continuing studies of the problems involved. It is believed, however—and the provisional assessments by Professor Tinbergen and Dr. Bos seem to confirm the belief—that the needs of the underdeveloped countries for education during the 1960's are so large as to require yet greater support by OECD countries. Furthermore, the task is such an overwhelming one that only bold and imaginative policies are likely to succeed.

The advanced countries can help by providing money, teachers, expert advice, and capital equipment, and by making places available in their universities, colleges, and other educational institutions. In spite of the pressure of domestic demand for the expansion of education during the next 2 years, the OECD countries should be ready to help the underdeveloped countries substantially and should take this help into account in making their own plans.

The following measures, agreed on as important, are proposed as guidelines to action by developed countries, who should remember that the initiative in forming plans for educational development and requests for assistance must always lie with the underdeveloped countries themselves.

(1) Assist the underdeveloped countries in assessing their present and long-term needs for education in relation to economic and other development objectives, and in forming strategies and priorities for the balanced expansion of education. Such assessments are necessary in determining the assistance required and in establishing priorities for its use. Emphasis on the development of human resources should not, however, obscure the need for equilibrium in developing physical as well as human capital.

(2) Bearing in mind the extreme shortage of people competent to prepare and apply the strategies for developing human resources, urgently seek to multiply the number of such experts. The task presents an opportunity for international cooperation between the nations and organizations concerned, possibly by building on the experience and skills already developed in the OECD programs for developing human resources, particularly in scientific and technical personnel.

(3) Be ready to encourage, support, and participate in efforts to develop educational structures, curriculums, teaching methods, certificates and degrees, and arrange-

ments for financing education suitable to the conditions of the underdeveloped areas and to their need for creative change within the framework of their own traditions and values. To this end they should make available objective evaluations of their own educational experience and support endeavors to hasten the process of change by educational research. (The need for research and objective evaluation so as to avoid the adoption of ready-made systems developed for quite different conditions was an underlying theme throughout the discussion.)

The shortage of teachers is likely to be the principal obstacle to the development of education. The provision of qualified teachers for higher educational systems and support of teacher training in the underdeveloped countries themselves will help to close the gap, but the shortage is so acute that fundamental improvement in the organization and techniques of teaching through which the supply of teachers can be more effectively placed and used is even more urgent than for advanced countries.

The underdeveloped countries should be encouraged to develop their own educational systems to progressively higher levels. For some time, however, many of them will need to send abroad some or all of their students at higher and postgraduate levels. Quite large numbers of such students are now being educated in OECD countries and a substantial increase will be required. The balance of the advantage between educating the students in their own countries or abroad will vary from country to country and from time to time. Closer study of the educational, social, and economic problems involved will be valuable. The possibility of founding regional institutions of higher education and research in an underdeveloped area may in some countries be an alternative to sending students to the more advanced countries.

The aim of supporting the growth of education in the underdeveloped countries can only be effectively pursued if the donor countries and organizations are ready to contribute financial assistance—not merely technical assistance or exchange components—to the development and operation of educational institutions and structures.

For some time there will inevitably be a gap between the needs of the underdeveloped countries for qualified personnel and the capacity of their educational systems to produce them. The advanced countries should take this into account and adjust their own targets for educational development so as to be in a position to respond positively to requests for assistance.

The need for economic and educational development in the underdeveloped areas of Africa, Asia, Latin America, and in parts of Europe is thus recognized as great and urgent. Only if the advanced countries aid

the underdeveloped countries in a generous spirit can they be assisted in achieving the rapid economic and educational development essential to their own and the general welfare.

3. Notes by an observer

EUGENE P. McLOONE

The major headings of the conference summary, immediately preceding, indicate the flow of the discussion. It began with the relationship between education and the economy and continued by a logical progression of steps to the ultimate problem—how to plan for the future. I use the same sequence for my notes here, partly for my own convenience, partly for the convenience of the reader. [In these pages Dr. McLoone's notes stop short of the discussion on assistance to underdeveloped areas: he leaves this subject to a second observer from the Office of Education, Kenneth L. Neff, from the Division of International Education, whose comments will appear in a later issue.—Ed.]

Relationship between education and the economy

If the growing interest of economists in education as an investment in future growth produces what it promises, we may soon unravel the cause-effect relationship between education and economic growth. We have recently directed much attention to explaining the increase in the economy not attributable to increases in the classic factors of land, labor, and physical capital, and we have come so far as to add the education of the laborer to the list of factors; but even as we have done so, we have had to admit how far we still are from measuring with any precision the contribution of education to the national economy. Theodore Schultz, who has done much of the pioneer work on the relationship between education and economic growth, puts it this way: "The increase in education per person of the labor force that occurred between 1929 and 1957 explains between 36 and 70 percent of the otherwise unexplained increase in earnings

per laborer." His statement suggests, of course, that education is not the only process that conserves and improves the intangibles of human capital. Research and development programs and health programs also do.

At the same time that the participants affirmed the vital connection between education and economic growth, they agreed that not all educational expenditures are deliberate economic investments. Virtually every country, they said, will put at least some money into education from no other motive than to satisfy man's deepest desires, his inner yearning. In some individuals this kind of education may serve the economy; in others it will not: whether it does or doesn't is quite beside the point as far as the expending country is concerned. If it does turn out to serve the economy, however, the extent would be very difficult to determine.

Although expenditure on education as a means of investment was the dominant theme of the conference, this point—that the economic worth of education is far from being the only one—was stressed again and again. It is a caveat which seems to have become part of the standard introduction to any discussion of investment in human capital, and it was no doubt repeated often here out of the eagerness of the participants that no one should misunderstand the tone of the conference or misinterpret its findings. Schultz expresses a similar caution in the *Sixtieth Yearbook of the National Society for the Study of Education*:

My treatment of education in no way detracts from or disparages the cultural contributions of education. It honors these and proceeds to the task of determining whether there are also some economic benefits from education that may appropriately be treated as capital which can be identified and estimated.

Such cautions may soon become unnecessary, however, as we grow more acquainted with the idea of education as a factor in economic growth. The acquaintance should ripen fast, for the idea has been brought up repeatedly in recent educational literature. The foreword to the October issue of *Review of Educational Research*, for example, points out that this issue, which is devoted to organization, administration, and finance, differs from preceding issues on those topics by its emphasis on the economics of education. There is also a textbook entitled *Economics of Public Education*, and the Committee on Educational Finance of the National Education Association has published a pamphlet on *Education and Economic Growth*.

Assessment of future needs

Projections, or estimates, of future educational needs in the OECD countries were presented in the report

Dr. McLoone, Office specialist in the economics of school finance, is a regular contributor to School Life. He has just been awarded a 1962 Federal Executive Fellowship from the Brookings Institution Center for Advanced Study, where he will continue his study of income elasticity of the property tax.



Targets for Education in Europe. Extensive projections for the United States were available in a document prepared by Louis Conger, Jr., chief of the Office's Reference, Estimates, and Projections Section (similar projections are made in the *Ten-Year Aims Papers* of the Office of Education). The conferees commended as a model Dr. Conger's projections for higher education. Dr. Conger had taken into account the factors in individual choices and had reflected them in various projections.

The conference recognized the need for at least three kinds of projections—service, manpower, and investment. All three are needed to determine the total educational need. Each must be related to the others.

Service projections are the usual ones in education; they take into account the facilities, staff, and expenditures required to continue today's standard of services for tomorrow's larger population (a number of these projections were presented in December 1960 *School Life*). They express a quantitative expansion only; but as a first step toward determining future educational needs they give perspective and are highly useful.

Manpower projections reflect the need for trained manpower by broad sectors of the economy and as such are needed in planning educational programs and curriculums. One of the studies undertaken in the United States to translate the Nation's manpower needs into an educational program is reported in *Vocational and Technical Education in Illinois: Tomorrow's Challenge*, by William P. McLure. He used the manpower projections by the United States Department of Labor and both the present and the projected structures of the Illinois economy to plan for future educational needs in training the needed manpower. Since manpower projections are traditionally viewed as a function of a labor department, the need for them may not be recognized in other areas of research. For example, educators may neglect them in planning the educational programs; economists, in planning the economic program.

Projections of the educational investment needed for the sake of economic growth—these represent a new idea and the techniques of making them are less developed than for either service or manpower projections. Economists have long paid attention to the investments required in physical capital but until recently have neglected those required in human capital; and their neglect has hindered the projections. Two other obstacles, the conference pointed out, are the scarcity of persons trained in the strategy of using human resources and the great difference between educational and economic planning in the period of time each requires.

Although both service and manpower projections can be made in isolation, projections of the investment needed

in human capital cannot. "Human investments," Schultz says, "are the sum of all the acquired, useful capabilities of a people, whatever their sources." Therefore, to make investment projections, we must have data not only on formal education but on all the training that contributes to the development of human resources. Admittedly data are more difficult to obtain for on-the-job training than for formal education. To a degree this difficulty in making investment projections arises from the fact that they require research in areas that lie in the periphery of two or more overlapping jurisdictions or disciplines; as the participants repeatedly said, these overlapping fringes are often neglected, as if they belonged to no one. To cover the gaps, they said, joint action is required: not only must research studies be formulated so as to get this action but the persons conducting the research must communicate continually.

Supply of teachers

The background documents and the discussion made it almost immediately obvious that the shortage of teachers is worldwide: in both developed and underdeveloped countries it not only is the primary obstacle to the expansion of education but is likely to be a growing problem because of the increasing demand for trained men and women. If education is to have an adequate supply of teachers, the conference participants said, the total supply of trained people must increase.

Quantitative expansion, in their experience, is generally accomplished at the expense of quality in teaching; the increased need for teachers is met by the acceptance, at least temporarily, of teachers who are less than qualified. The problem prompted consideration of two ideas: use of technological devices for "stretching" the supply of qualified teachers; and immediate action on long-range measures for increasing the number of college graduates over the next decade.

Planning

Because it takes so many years to bring a man to a high degree of usefulness in a complex industrial society, education requires long-range planning. As Thorkil Kristensen said at the opening session, "If there is to be more education in 1970 or 1980, we must now not only build schools and universities, but we must provide for training of teachers of all grades; it takes many years to educate qualified experts for industry and agriculture, so much so that you must train the teachers who are later on to train the experts. We have for the moment a great shortage of teachers in the Western world. This is be-

cause we did not, twenty or thirty years ago, think enough of the future needs. This is what we have to do now."

It was generally agreed that each member country would have to develop an overall strategy. The strategy would vary, of course, from country to country, depending on the kind of educational system it had. Representatives of countries with decentralized systems, such as the United States, stressed their strong commitment to local control of the educational enterprise and the effect this would have on their planning; they pointed out that they would have to involve regional and local groups responsible for educational administration.

Planning is already being done in the United States, but it is being done sporadically and unevenly. A number of groups and individuals have recently made projections of students and educational expenditures at all levels. Some regional associations have used projections to determine the needs of their States for facilities and curriculums for higher education. Even individual States have used estimates of future school population in determining their needs.

Coordination among these separate efforts could be increased. Projections for educational services need the common base which is provided by manpower and investment projections. Working from such a base, individual institutions and States could plan their own efforts in relation to the common goals for manpower and economic growth and, in so doing, achieve both their own objectives and the objectives of the Nation. In other words, a framework is needed in which policy decisions can be made, mainly though not exclusively at the State and local levels, but this framework will not be available until we have determined what resources will be required to meet the objectives of the educational program, how adequate the present methods are for providing these resources, and the choices we have among methods for meeting future needs.

An example from economic forecasts and projections in the United States indicates the practicability of this broad planning in identifying needs and goals. The National Planning Association, a private nonprofit organization, makes national forecasts of the economy within the framework of the national income accounts. These forecasts are used by business and industry as well as governments in making refined projections for such things as the demands of industry, expected conditions for sales, and revenue. The NPA provides various models of the economy—for example, for high and low defense spending, for high and low consumer spending, for high and low government spending, and a judgmental model, that is, the model judged most likely. It also provides the bases for the projections—the basic data and

the past trends. Every year NPA holds a conference at which users of the projections exchange comments. From feedback of some of the industry refinements, NPA is able to improve its subsequent projections. Cooperation similar to this should be possible in the educational enterprise.

Work conference

Coordination of research effort, however, is needed not only within the United States but also among the countries of the OECD. The policy conference discussed the need for research on 1) education as an organized process that continues through all levels—elementary, secondary, higher; 2) optimum use of resources available to education; 3) the demand side of teacher supply; and 4) various combinations of resources that could be used to achieve a desired result in education. Many of these topics were further explored in a two-day work conference held by American and European economists after the policy conference.

The European economists attending the work conference were members of the Study Group of OECD on Economics of Education. Now that OECD has expanded to include the United States and Canada, this group was interested in learning more about research in these countries and describing European research to the Americans. At present, Seymour Harris of Harvard University is the only United States member of the study group, but an increase in the United States representation is being considered. The study group selects its own members from those interested in economics of education but maintains a balance among the countries of OECD.

There was a general consensus that a focal point was needed in the United States to which persons pursuing research in economics of education or interested in research in this area could go for information on present undertakings within the Nation. The Office of Education seemed to the participants to be the logical focal point to accommodate the diverse interests of individuals, institutions, and government agencies.

It was generally agreed that much of the research and the fact-gathering would need to be done by educators, educational institutions, and education ministries. The task of economists would be to ask the questions that place educational research in an economic framework, and to formulate the economic theory of human capital. The operations research of educational systems and institutions would provide the micro-economic work, in which the tools of economic analysis could and should be applied. General economic planning would provide the macro-economic work.

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